The Kansas WIC Training Modules

LOCAL AGENCY VENDOR MANAGEMENT

This module requires use of the computer and the KWIC Training Application

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Instructions

This module requires use of the computer.

See the New Employee Training Process materials for detailed instructions, including how to log onto KWIC Online Training.

The information in one module section usually builds on that in previous sections. Therefore it is important that you start at the beginning of each module and work through it from beginning to end. It is also important to complete the modules in the order listed on the WIC Training Module Completion Sheet.

Words that are printed in the KWIC policy module glossaries are printed in bold italics the first time they appear in the text.

The Progress Checks and Skill Builders are meant to be learning tools. To challenge yourself, try to complete each one without referring back to the text. Feel free to look back in the training module pages if you need to refresh your memory.

Be sure to ask your Local Agency (LA) WIC Coordinator or supervisor if you don't understand the policies and procedures presented in the modules, or what is meant in the Progress Checks and Skill Builders. After completing the module, your WIC Coordinator or supervisor will review your progress and document your completion of the module. If additional review is needed, your supervisor will follow up until you both are confident of your progress.

Objectives

Upon completion of this activity the employee will be able to:

1. Locate and use the various windows in the Local Agency Vendor Management application.
2. Track and modify information about vendors.
3. Document the results of a monitor visit.
4. Document information about a vendor's training history.
5. Document information about technical assistance provided to a vendor.
6. Add, view and update information about a Notice of Correction.
7. Record complaints against vendors.
8. View, edit and add information about a complaint against a vendor.
9. View and generate a variety of vendor reports including vendor labels.

Introduction to Local Agency Vendor Management

Vendors are assigned to agencies by the state staff using the State Agency Vendor Management application. Listed below are the Vendor Management application components that are available at the clinic level. Clinic staff members, with the appropriate authority, are able to update selected vendor demographic information and record vendor monitoring, training, technical assistance, and complaints.

Windows

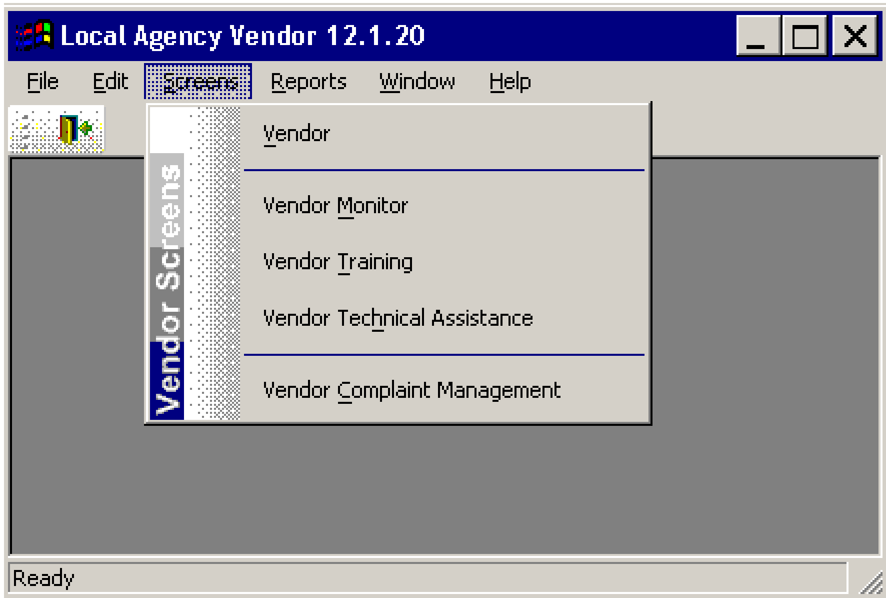
- Vendor Tab Set:
  - Find Tab
  - Detail Tab – view only
  - Vendor Staff Tab – view, add, update
  - Status Tab - view only
  - Store Hours Tab - view, add, update
  - Languages Tab - view, add, update
  - Training/Monitor Tab – view only
  - Owner Tab – view only
  - Notes Tab – view and add
- Monitor Tab Set – view, add, update
- Vendor Training Tab Set – view, add, update
- Vendor Technical Assistance Tab Set – view, add, update
- Vendor Complaint Management Tab Set – view, add, update

Reports:

- Food Quantity Report
- Vendor Activity History Report
- Vendor Complaint Pending Report
- Vendor Labels
- Vendor Listing and Volume Report
- Vendor Monitor Report
- Authorized WIC Vendor Report
- Vendor Training Report
- Vendor Attendance Sheet

Screens Menu

The **Screens Menu** provides access to the windows used to maintain vendor information.



There are 5 windows in the Screens menu:

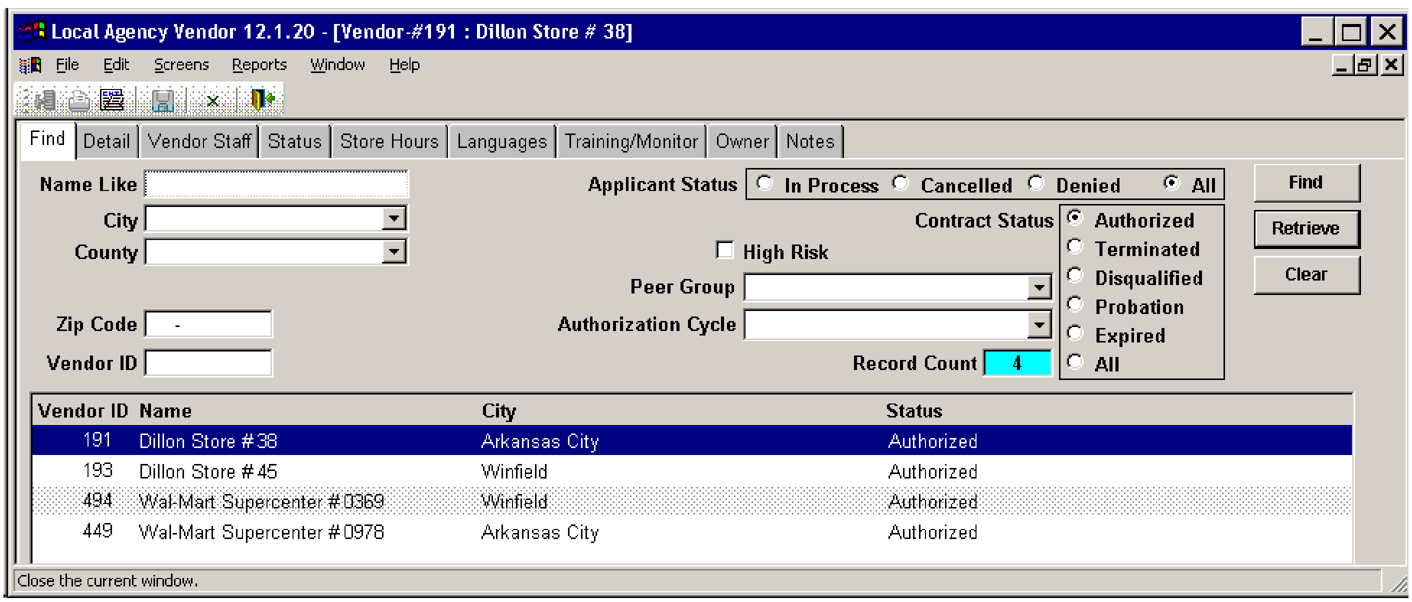
- Vendor window is where vendor information is entered, including vendor staff members, store hours and notes.
- Vendor Monitor window is used to record monitoring visits and view past monitor visits.
- Vendor Training window is used to schedule vendor trainings and record the vendors who have attended trainings.
- Vendor Technical Assistance window is used to enter and maintain information about technical assistance provided to a vendor.
- Vendor Complaint Management window is used to create, view, edit, and add information about vendor complaints.

Vendor Window

The **Vendor Window** is used to track and modify information about vendors.

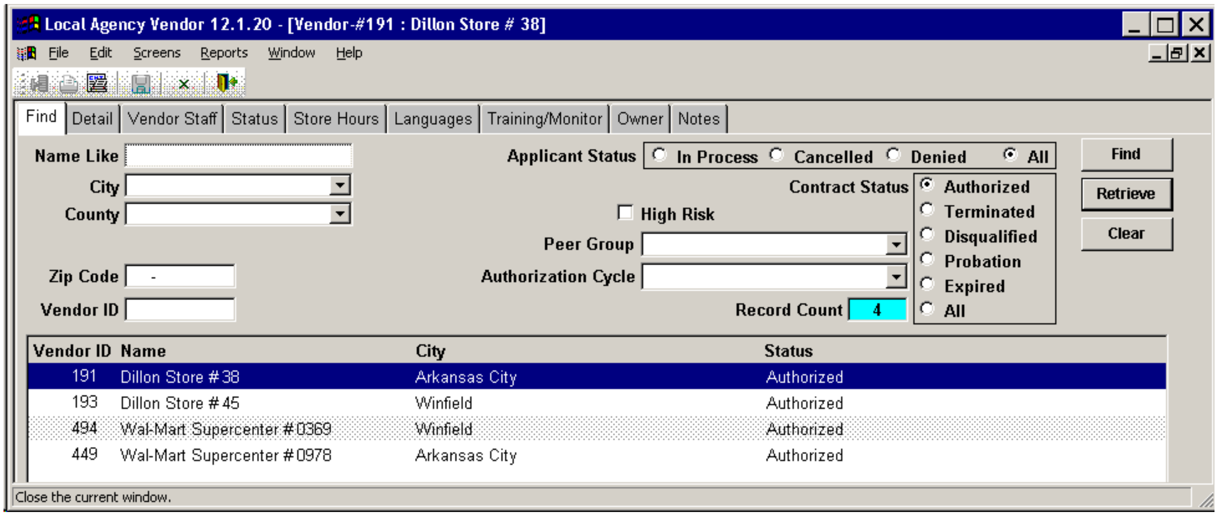
The **Vendor Window** has 9 tabs:

- Find
- Detail
- Vendor Staff
- Status
- Store Hours
- Languages
- Training/Monitor
- Owner
- Notes



Find Tab

The **Find Tab** is used to locate the record of a vendor.



Enter The Following Information:

Click the **[Find]** button to show all existing vendors in your county. This could be a very long list. ~Or~ Enter one or more of the following search parameters then click **[Find]**:

Name Like - finds vendors by entering full or partial names.

City - shows all vendors in the selected city. Only cities with WIC vendors (of any status) appear in the list.

County - shows all vendors in the selected county.

Zip Code - shows all vendors within the entered zip code.

Vendor ID - shows only the corresponding Vendor record.

Peer Group - shows all vendors in the selected peer group.

Authorization Cycle - shows all vendors from the selected authorization cycle.

Applicant Status - limits the search to vendors with applications In Process, Cancelled, Denied, or All. Defaults to All.

Contract Status - limits the search to the status selected: Authorized, Terminated, Disqualified, Probation, Expired, or All. Defaults to Authorized.

High Risk Check Box - shows all vendors matching other search criteria with a status of High Risk.

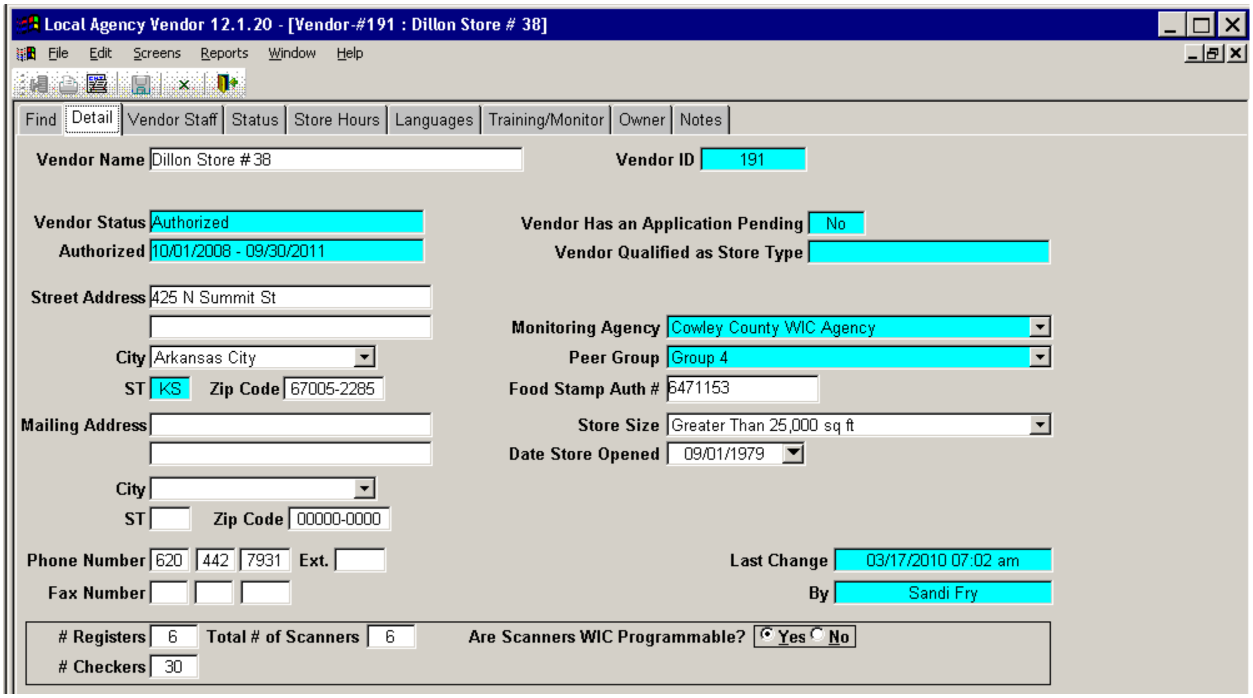
The **Record Count** field displays the number of vendor records returned by the search.

The **[Clear]** button resets all search fields to their defaults and clears the list to start a new search.

- In the list box, highlight the record you wish to work with, and click **[Retrieve]**. The Detail tab opens and displays data about the vendor you selected.
- The search list remains after a record has been retrieved. If you want to look at a second record from the same list, be sure to click **[Retrieve]** to pull up the second record; otherwise, the original information is still displayed.

Detail Tab

The **Detail Tab** is used to view demographic information about the selected vendor. All information is entered at the State Agency when a store becomes a WIC vendor.



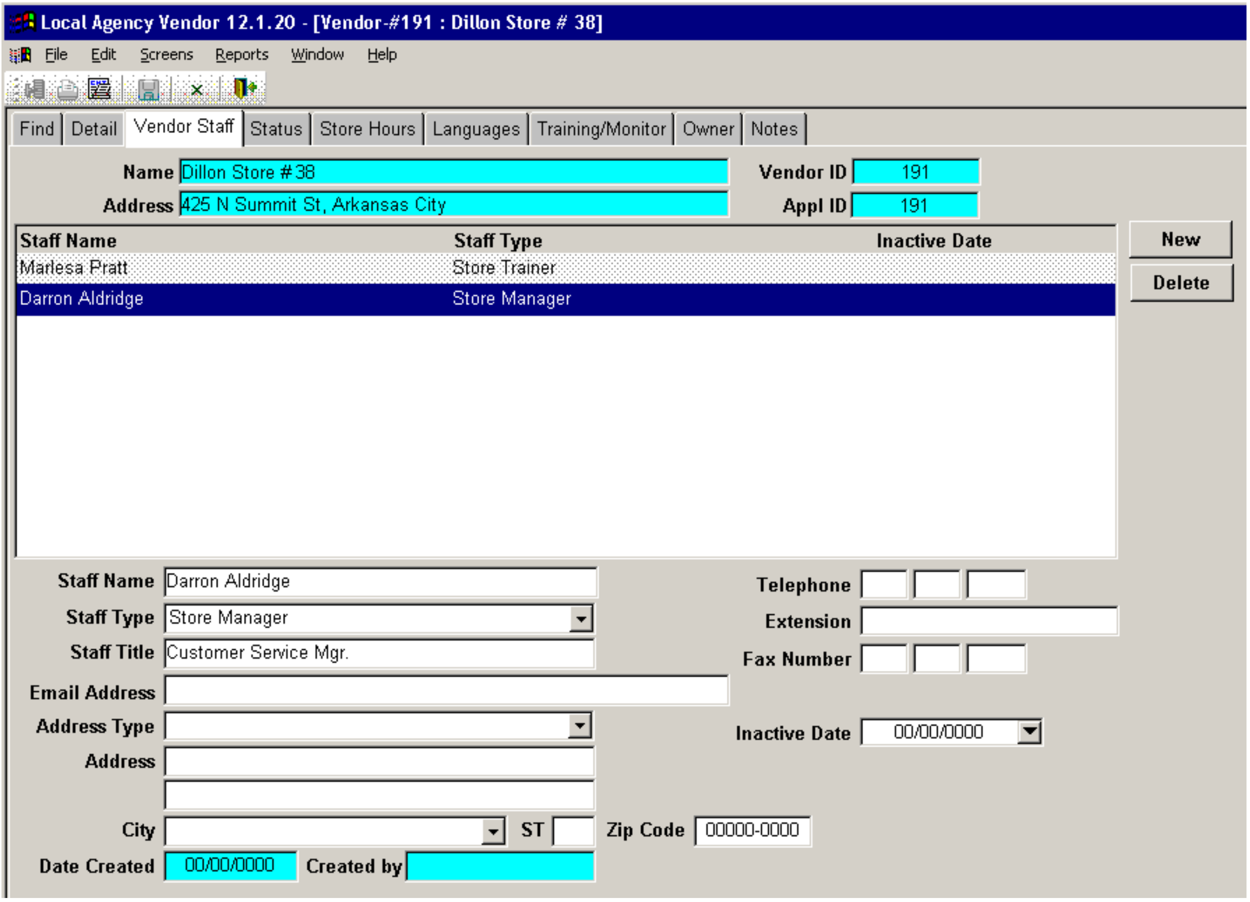
The Local Agency can view the following information:

- Vendor Name - the vendor name and vendor ID.
- Street Address - the physical location of the store. The complete street address is required.
- Mailing Address - a mailing address if the Vendor receives correspondence from WIC at an address other than the street address.
- Food Stamp Authorization # - the Vendor's Food Stamp Authorization number.
- Store Size – square footage of retail space at the store location.
- Date Store Opened – the date the store opened.
- Phone Number – store location phone number including extensions, if any.
- # Registers – the number of cash registers.
- # Checkers - the number of checkers employed. This information is helpful for producing training materials.
- Total # of Scanners – usually the same number as the number of registers.
- Are Scanners WIC Programmable? – Yes/No

Only the State Agency can enter or update items on this tab.

Vendor Staff Tab

The **Vendor Staff** tab is used to record the names and contact information of store staff.



The Local Agency can add/update the following information:

Click the **[New]** button.

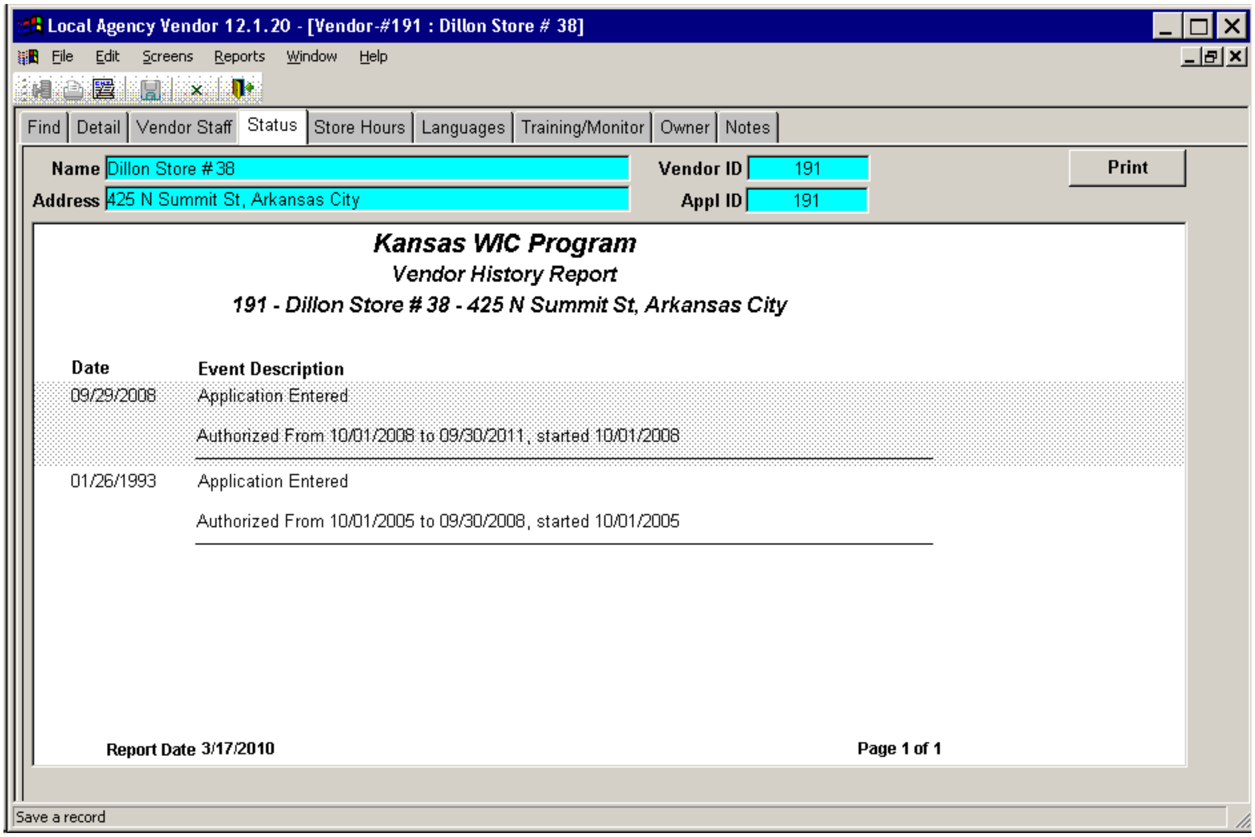
- Enter the Staff Name
- Select a Staff Type
- Enter a Staff Title if different than the Staff Type
- Add any contact information you wish, especially if different than the store information.

To Save The Record:

- Click the **Save** icon  on the toolbar.

Status Tab

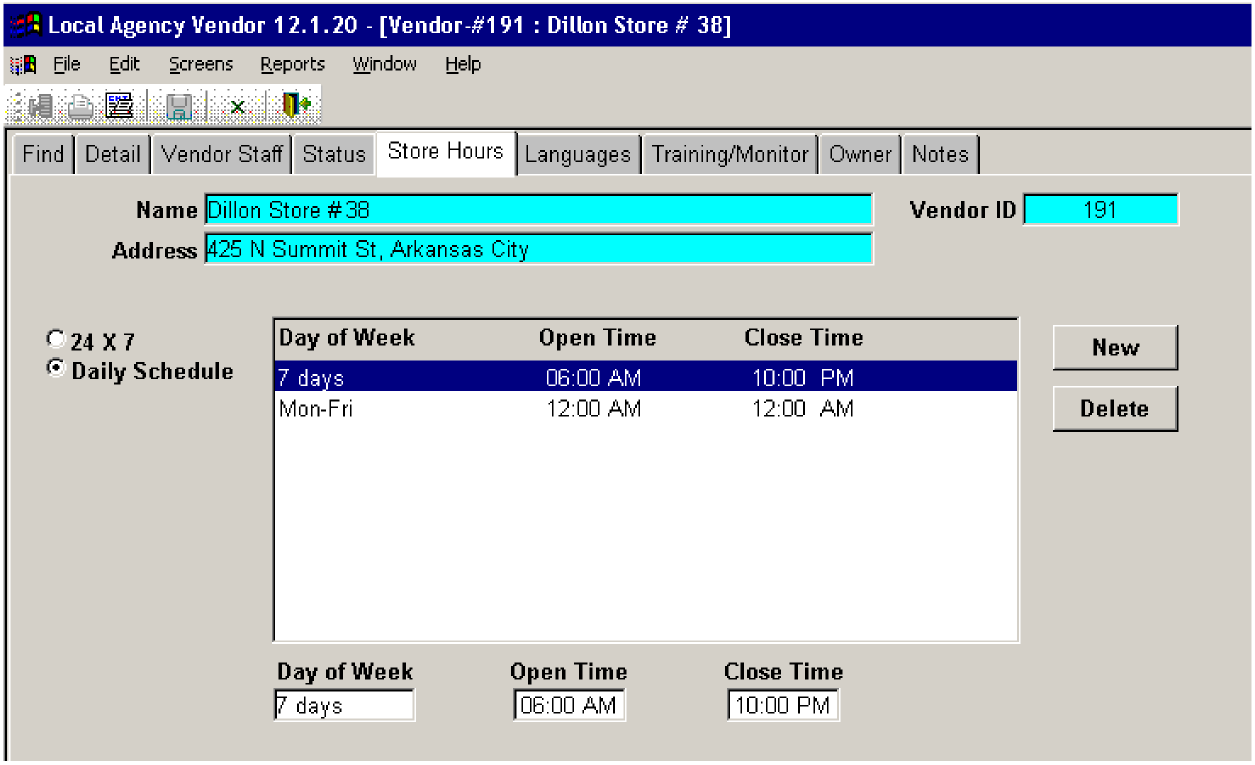
The Status tab displays a historical record of the vendor's contract status.



The Local Agency can view the information.

Store Hours Tab

The **Store Hours Tab** is used to enter, change and/or view the hours the selected vendor is open.



Enter The Following Information:

1. Select the **Store Hours** tab.
2. Enter or view information as follows:

   Select 24 X 7 if the store is open every day of the week 24 hours a day.

   Select Daily Schedule if the store's hours vary. The default (when **[New]** is clicked) is **Mon - Fri**, 12:00 AM - 12:00 AM.
   For consistency, use these abbreviations:

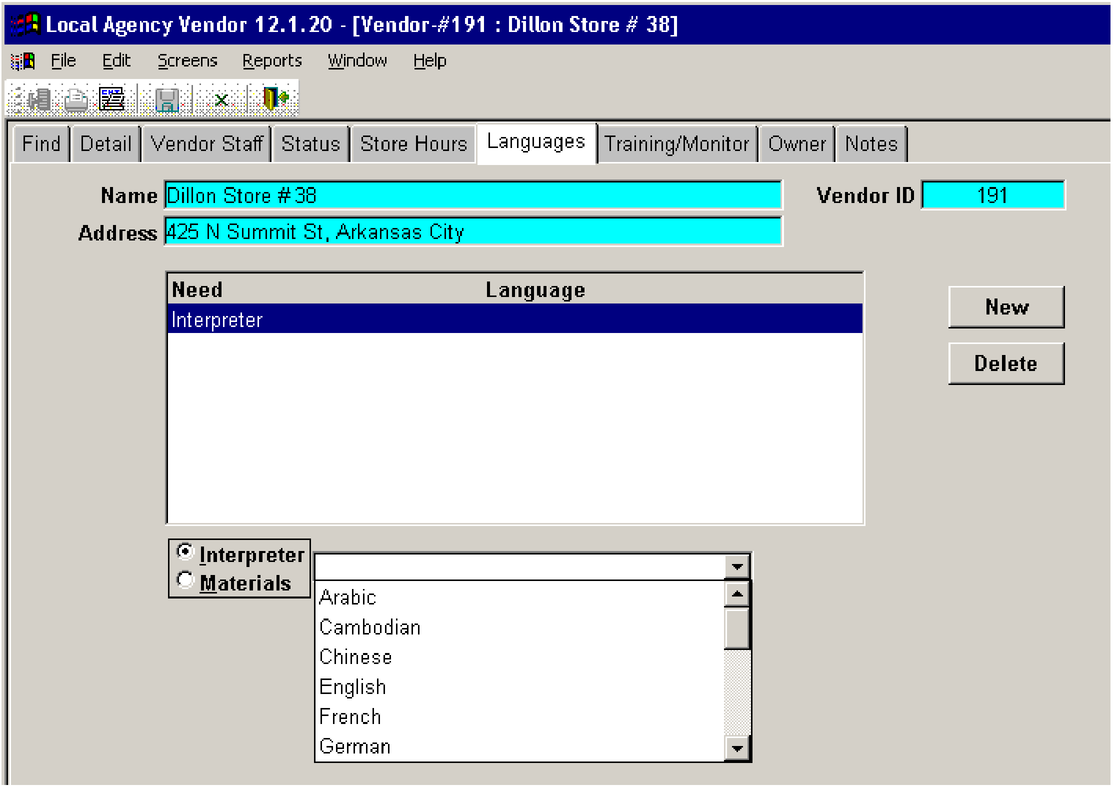
   Day of the Week:
   Sun = Sunday
   Mon = Monday
   Tue = Tuesday
   Wed = Wednesday
   Thur = Thursday
   Fri = Friday
   Sat = Saturday

   Open Time/Close Time - change AM and PM by typing SHIFT-A or SHIFT-P.

3. Click [**Save]** to save this tab (and any other changes in the window).

Languages Tab

The **Languages Tab** is used if the employees of a vendor have special language needs.



Enter The Following Information:

1. Select the **Languages** tab.
2. Enter or view information as follows:

   Interpreter - if the vendor needs an Interpreter when WIC staff visit, click **[New]**, select Interpreter, then select a language from the drop-down list.

   Materials - if the vendor needs special language materials, click **[New]**, select Materials, then select the specific language from the drop-down list.
3. Enter or view information on the remaining tabs in the window, if applicable. tab
4. Click the **Save** icon to save any changes made.

Training/Monitor Tab

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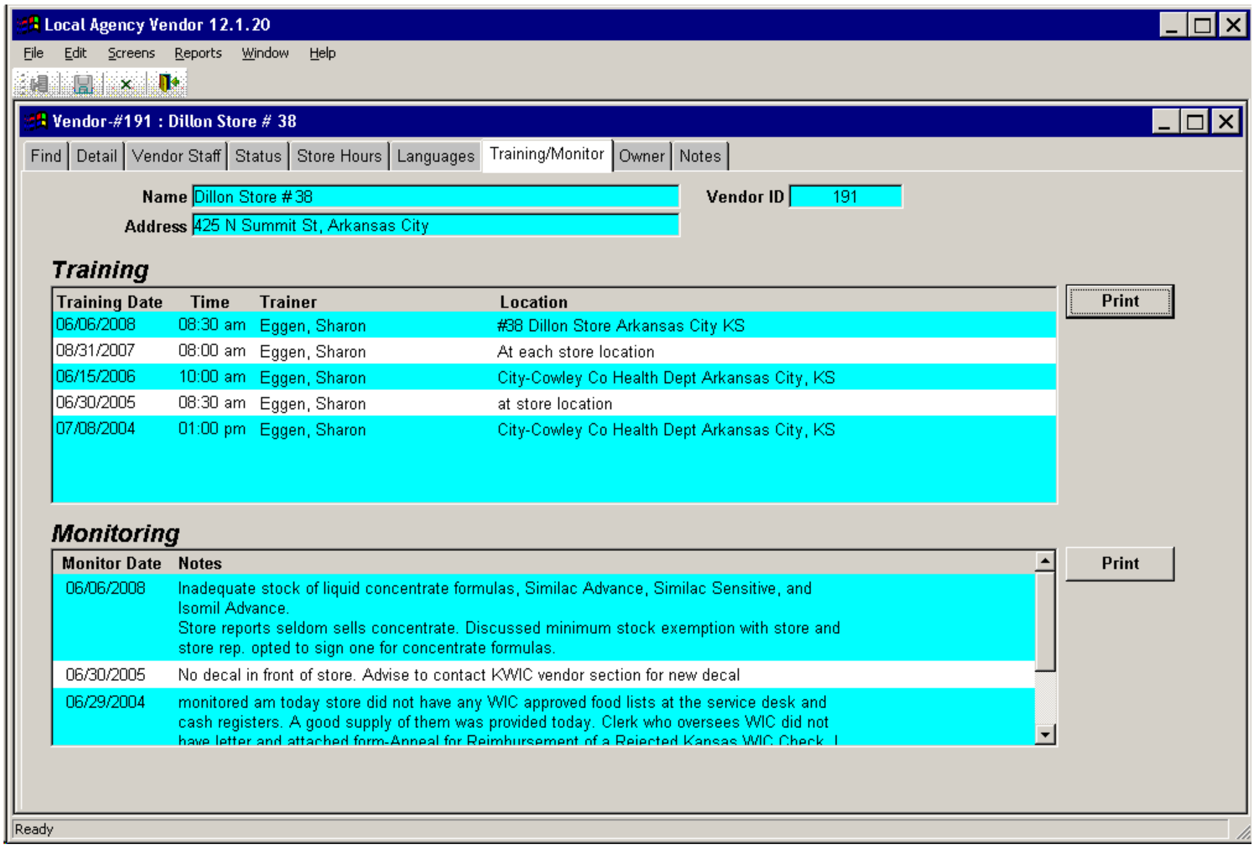
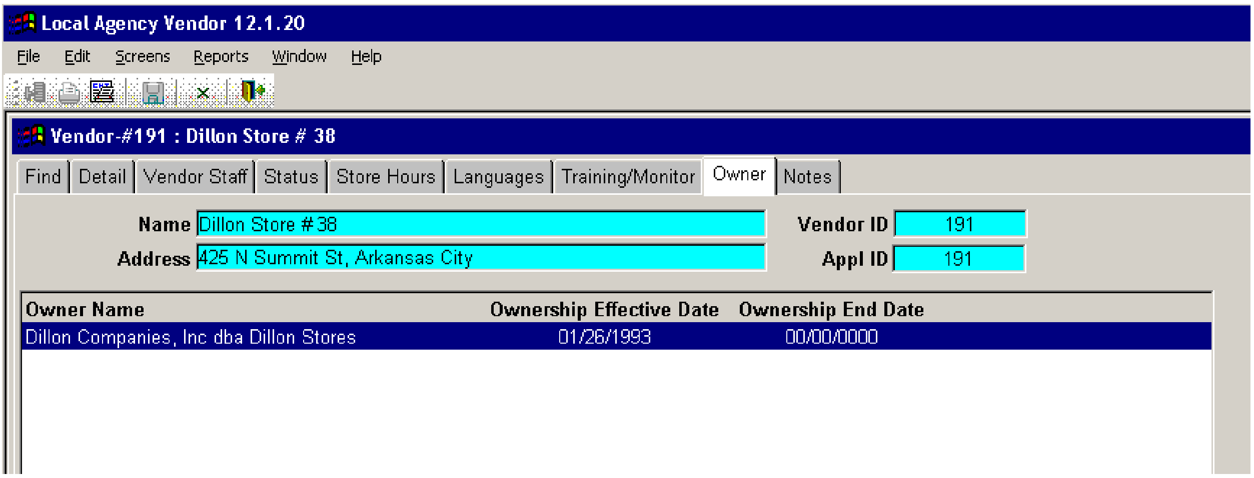
- The **Training/Monitor Tab** is used to view a list of all training classes and monitoring visits completed for the selected vendor. New training and monitor information is entered in the Vendor Training and Vendor Monitor windows. The aqua color of the list boxes indicates that the information is read-only.



This is a view only screen.

Owner Tab

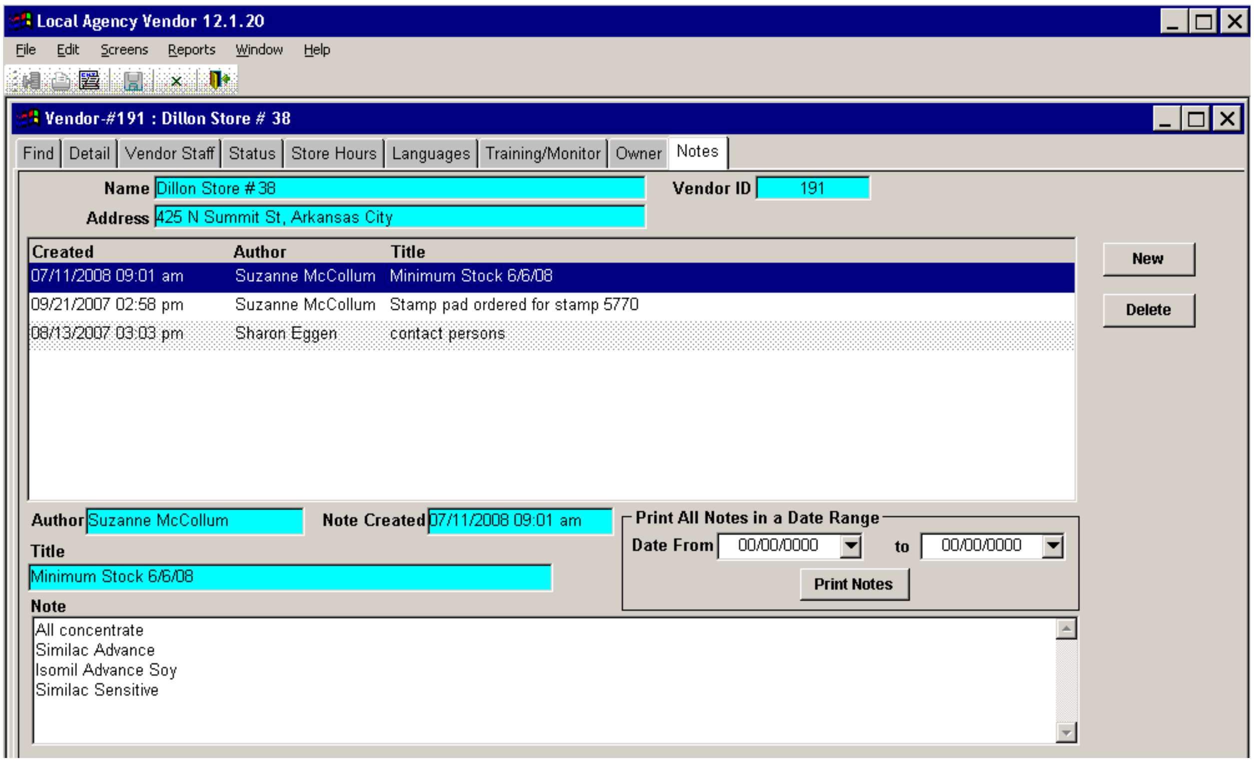
The **owner tab** is used to view current and past store ownership. A vendor may only have one owner at a time and there cannot be any gaps in ownership periods. New records are displayed at the top of the list.



This is a view only screen.

Notes Tab

The **Notes tab** is used to record any additional information about the vendor. Phone calls and supply orders can be logged in notes.



Enter The Following Information:

1. Select the **Notes** tab.
2. Enter or view information as follows:

   New – Click to enter a new note.

   Title - Enter a descriptive title.

   Notes - enter any information about the vendor that is appropriate to keep as part of the Vendor's record, and that is not otherwise documented in the system.
3. Print notes by entering a date range in the Print All Notes in a Date Range box and clicking [Print Notes].
4. Click the **Save** icon  to save any changes made.

Skill Builder
Vendor Window

Instructions: Use the information below to update an existing vendor record.

1. Open the Vendor window.
2. Use the Find tab to select a vendor.
3. The vendor selected is making some changes at this location. Use the information below to update the vendor's record:
   - A new store trainer, Rusty Spring, has been assigned and 5 checkers have been hired.
   - The store will increase their hours. They will be open from 8:00AM until 10:00PM Monday through Friday.
   - English is a second language for several of the new employees. An interpreter and materials written in Spanish (if Spanish is already selected pick another language) are needed.

Vendor Monitor Window

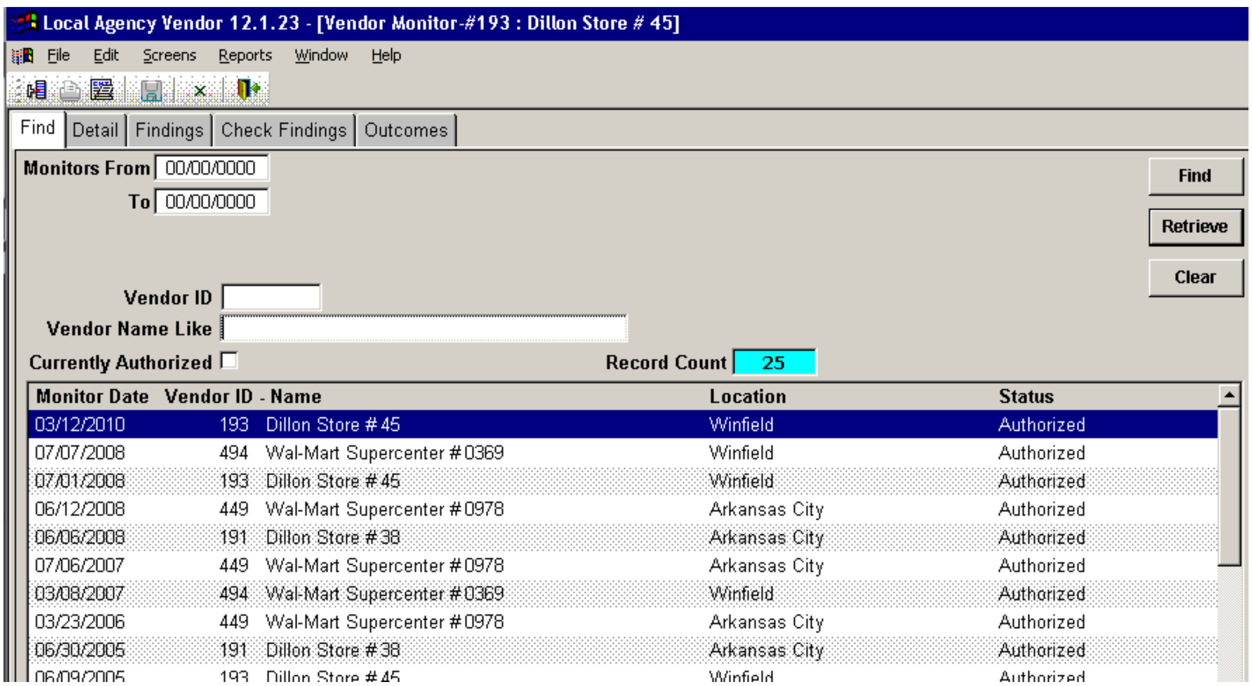
The **Vendor Monitor Window** is used to document the results of a monitor visit to a vendor. When you return from a monitor visit you will enter the information collected.

The **Vendor Monitor Window** has 5 tabs:

- Find
- Detail
- Findings
- Check Findings
- Outcomes

Find Tab

The **Find Tab** is used to locate the record of a previous monitor record.



Enter The Following Information To Find A Previous Monitor Record:

1. Click the **[Find]** button to show all existing vendor monitor records. This could be a very long list. Or enter one or more of the following search parameters then click the **[Find]** button. Remember, you will only see information regarding vendors assigned to your agency.

   - Monitors From/To finds all records between the beginning date and end date of the range you want to search.

   - Vendor ID finds monitoring visits for the specific vendor whose ID is entered.

- Vendor Name Like finds vendors whose names begin with the string of characters that you enter.

2. In the list box, click the record you wish to work with to highlight it, and click the **[Retrieve]** button. The Detail tab opens and displays data about the vendor monitor you selected.
    - The **[Clear]** button clears all search fields and the return list so that you can start a new search.
    - The search list remains after a record has been retrieved. If you want to look at a second record from the same list, be sure to highlight it and click retrieve to pull up the second record; otherwise the original information is still displayed.

Enter The Following Information For A New Vendor Monitor Visit:

Click the New icon  on the toolbar. A blank Detail tab opens.

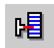
1. Select the vendor that was monitored from the vendor drop down list. This field will be aqua when viewing previous monitoring visits.
2. Enter the monitor date. The default is the current date; be sure to enter the actual date of the monitor visit. This field will be aqua for previous monitor visits.
3. Select the Reason for Visit:

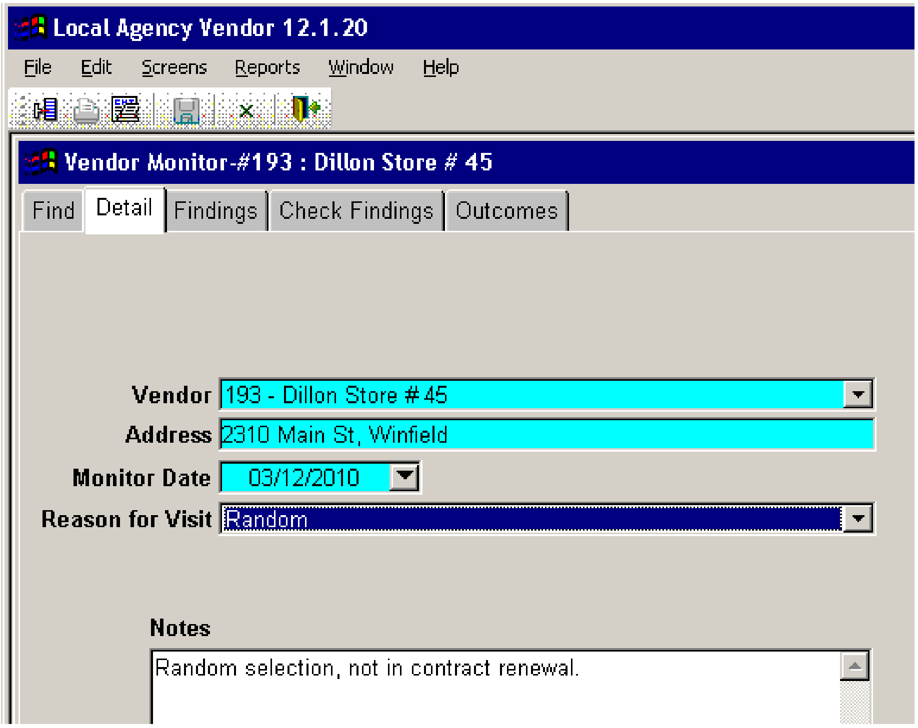
Enter notes for the monitor visit.

Click the **Save** icon  to save information.

 Remember to save after completing each tab so you don't lose any of your information.

Detail Tab

The **Detail Tab** displays and records basic information about a monitoring visit. This tab becomes available for editing when the  New icon is clicked.



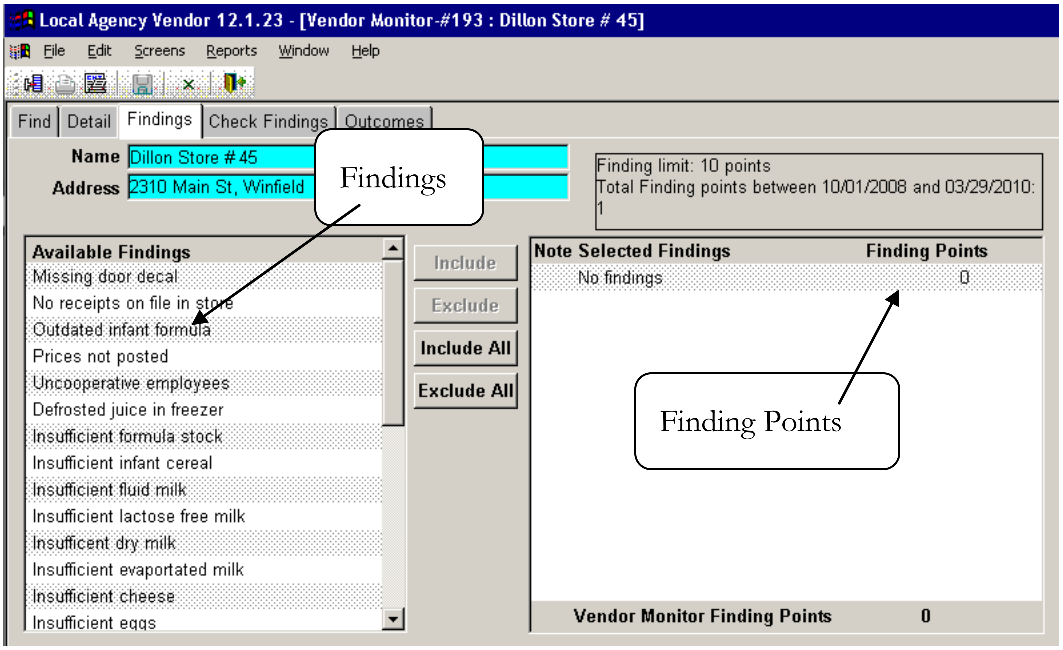
Use the following procedure to enter or view information on the vendor monitor detail tab:

1. Select Screens/Vendor Monitor from the menu bar. The Vendor Monitor window opens to the Find tab.
2. Use the Find tab to retrieve an existing monitor record.
4. For existing records:
   - **Vendor** – read only
   - **Address** – read only
   - **Monitor Date** – read only
   - **Reason for Visit** – view, edit or add
   - **Notes** – view, edit or add
5. Click the **Save** icon  to save any changes made.

 Remember to save after completing each tab so you don't lose any of your information.

Findings Tab

The **Findings Tab** is used to view, add and/or edit the findings of a Vendor Monitor visit.

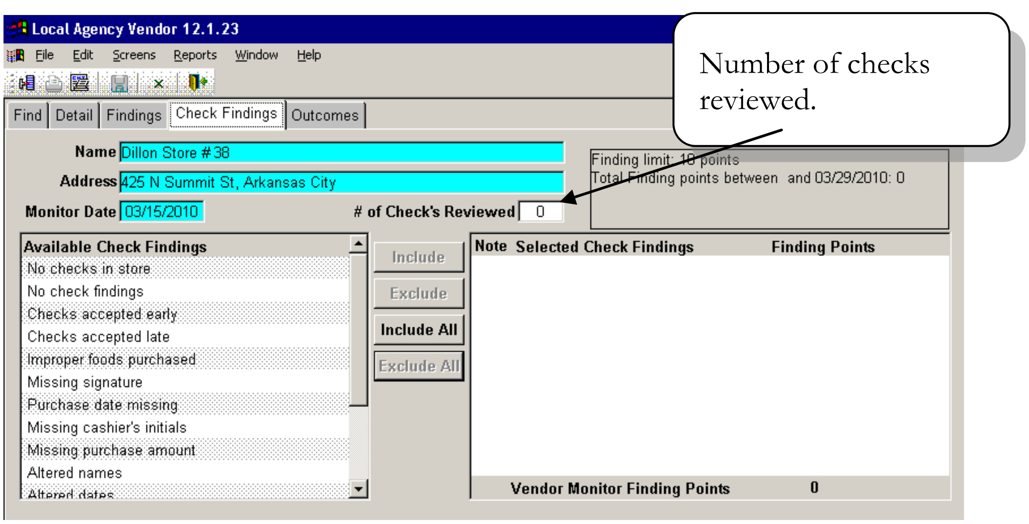


Enter The Following Information:
Highlight an Available Finding by clicking on it, and click the **[Include]** button to move it to the Selected Findings box. Multiple findings can be highlighted and moved.

1. To remove a finding, highlight it in the Selected Findings box and then click the **[Exclude]** button.
2. Findings generate finding points that accumulate during a vendor's authorization cycle.

Check Findings Tab

The **Check Findings Tab** is used to view, add, and/or edit the findings of a review of WIC checks during a vendor monitor visit. There may not always be checks to review.



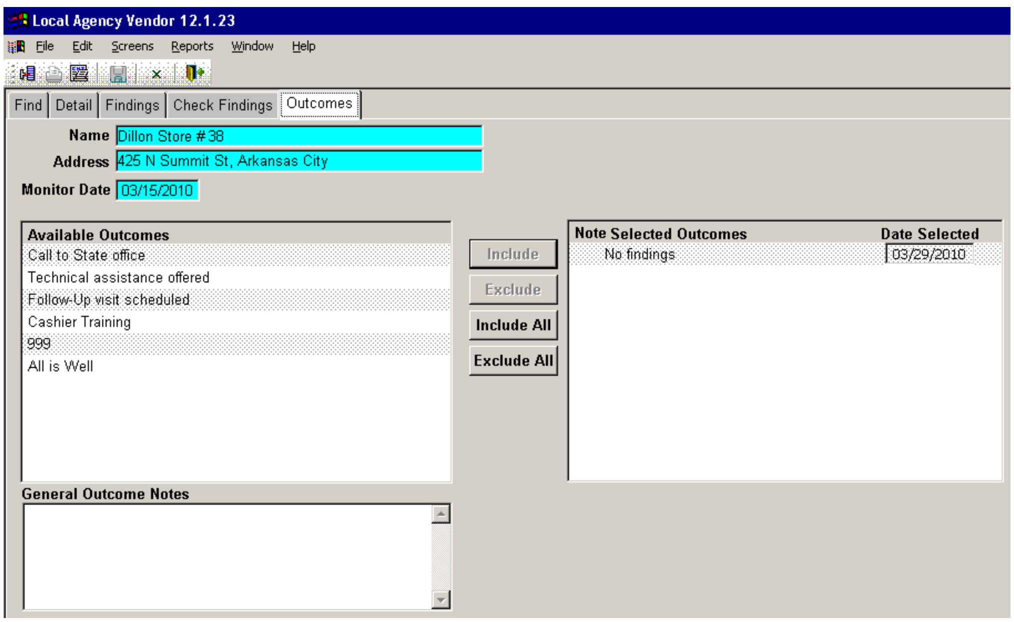
Enter The Following Information:
The number of checks reviewed **must** be entered in the # of Checks Reviewed box at the top of the tab.

- Highlight an Available Check Finding by clicking on it, and click the **[Include]** button to move it to the Selected Check Findings box. Multiple check findings can be highlighted and moved.
- To remove a check finding, highlight it in the Selected Check Findings box and click the **[Exclude]** button.

- Findings generate finding points that accumulate during a vendor's authorization cycle.

Outcomes Tab

The **Outcomes Tab** is used to view, add and/or edit the outcome of a Vendor Monitor visit.



Enter The Following Information:

- Highlight an Available Outcome by clicking on it, and click the **[Include]** button to move it to the Selected Outcomes box. Multiple outcomes can be highlighted and moved.
- To remove an outcome, highlight it in the Selected Outcomes box and click the **[Exclude]** button.

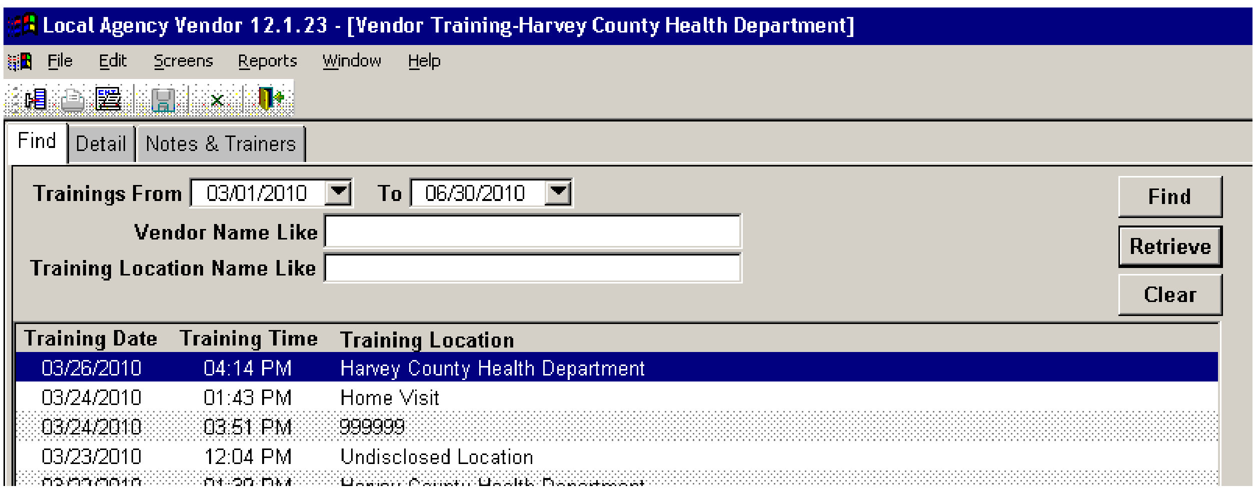

Remember to Save!!

Vendor Training Window

The **Vendor Training Window** is used to document information about a vendor's training history. The Local Agency Vendor Management Application lists only vendors assigned to your Local Agency.

The **Vendor Training Window** has 3 tabs:

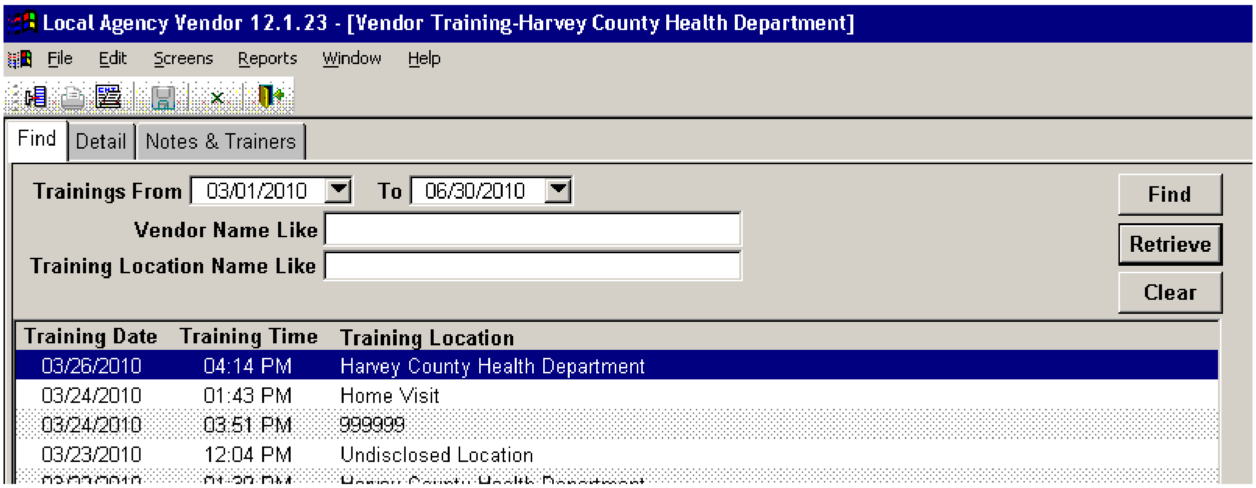
- Find
- Detail
- Notes & Trainers



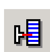
Local Agency staff provides vendors training on WIC vendor policies and procedures. The training is designed to prevent program errors and abuse as well as to improve program service.

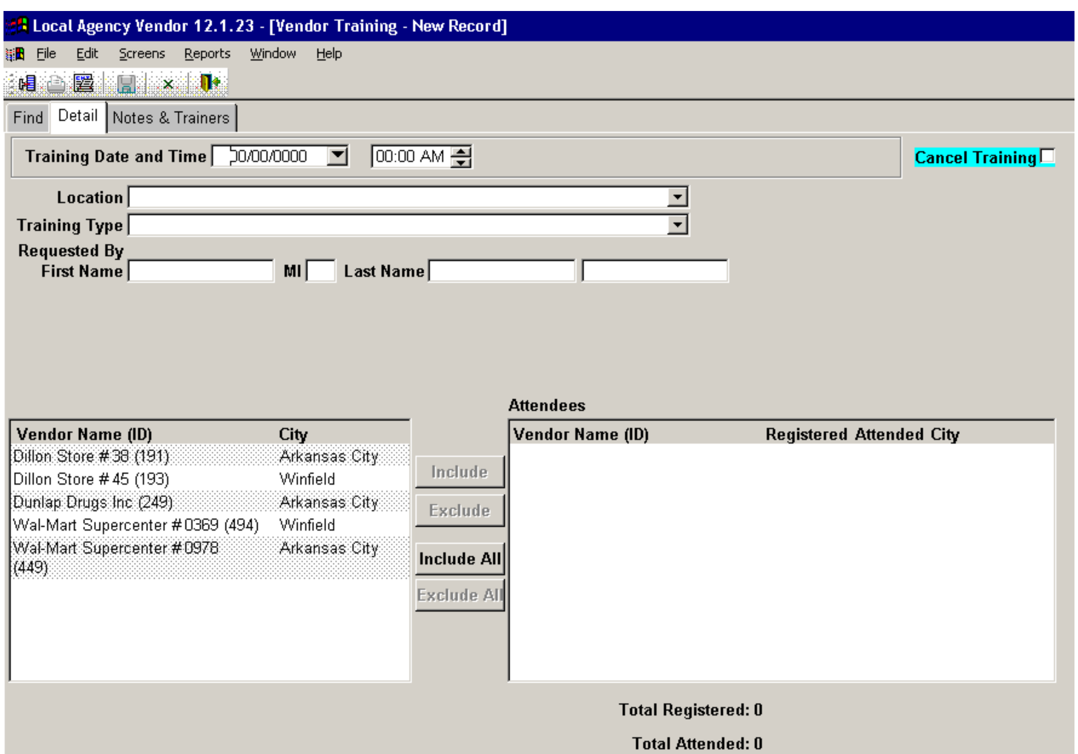
Find Tab

The **Find Tab** is used to create or locate the record of a vendor training event.



To Enter A New Training Event Record:

Click the New icon  on the toolbar. A blank Detail tab opens enabling the user to enter the new training event information.



Enter The Following Information To Find A Previous Training Event Record:

1. Click the **[Find]** button to show all existing trainings. This could be a very long list.

   OR enter one or more of the following search parameters then click the **[Find]** button.

   - Trainings From/To finds all records between the beginning and ending dates of the range you want to search. The "Trainings From" date must be prior to the "To" date.
   - Training Location Name Like - Enter the name or partial name of a specific training location to retrieve all training classes scheduled at that location.

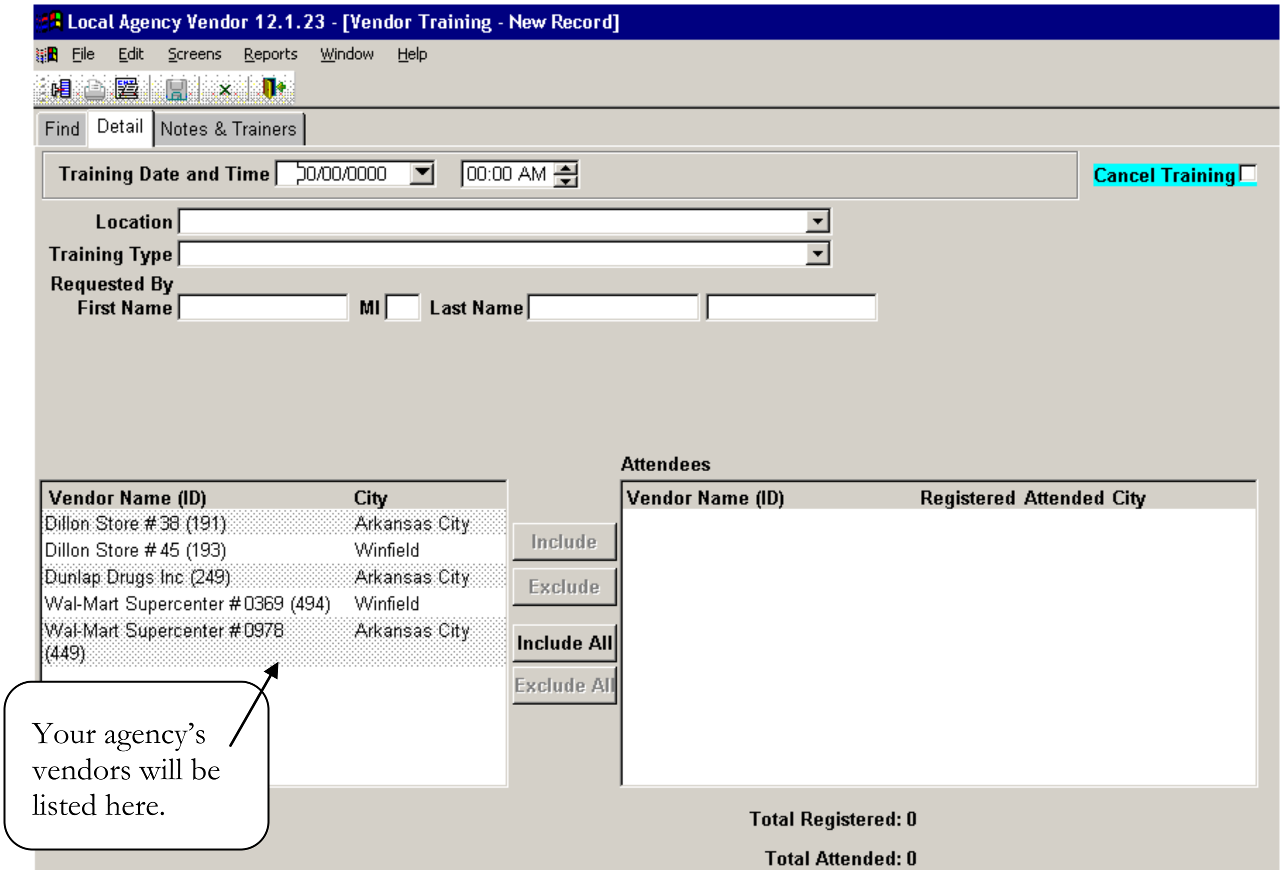
In the list box, click the record you wish to work with to highlight it, and click the **[Retrieve]** button. The Detail tab opens and displays data about the training you selected.

The **[Clear]** button clears all search fields so that you can start a new search.

The search list remains after a record has been retrieved. If you want to look at a second record from the same list be sure to highlight it and click the **[Retrieve]** button to pull up the second record; otherwise, the original record's information is still displayed.

Detail Tab

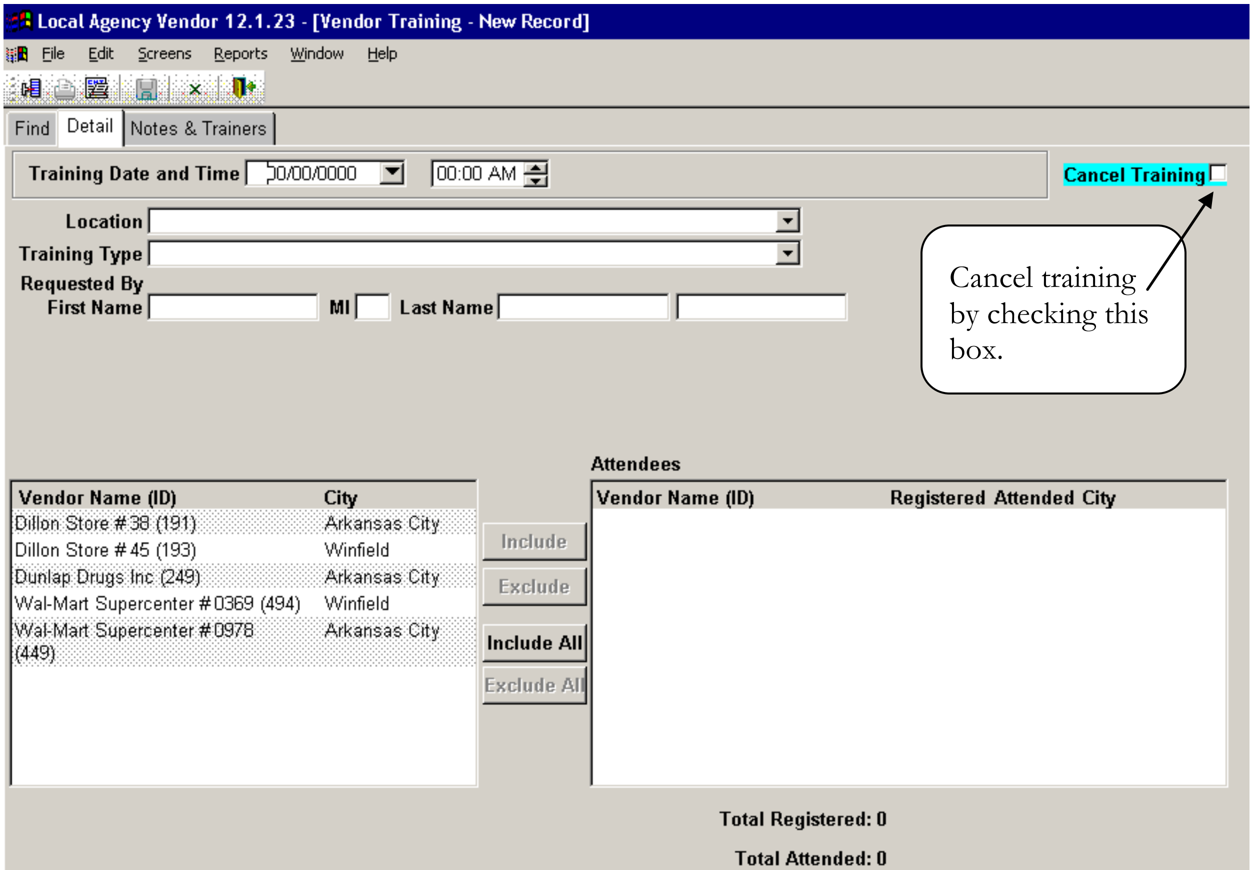
The **Detail Tab** is used to view, add and/or edit details of the selected vendor training. This tab is used to document those vendors that have registered to attend a specific class.



Enter The Following Information:

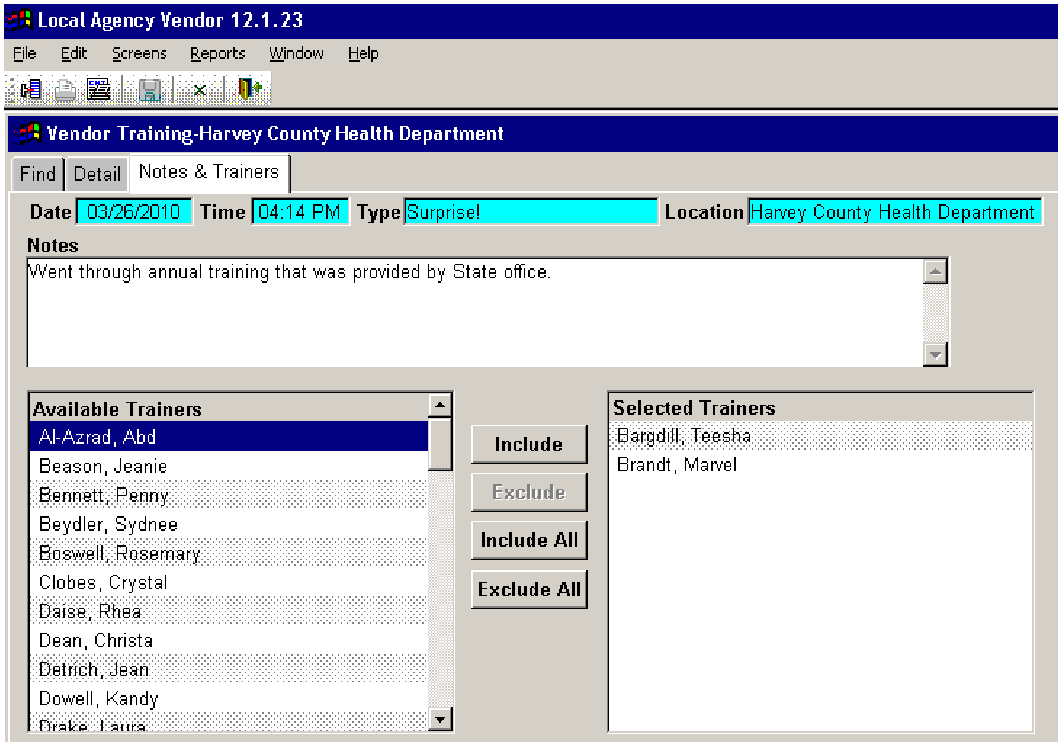
1. Enter the date and time of the training.
2. Select the location of the training.
3. Enter the name of the person who requested the training, this might include a request from someone at the store, a State or Local Agency WIC representative.
4. Select the vendors that should attend the training by clicking on them to highlight them, and click the **[Include]** button to move them to the Attendees box.
5. When you have the figures, enter the number of people registered and the number of people who attended the training from each vendor choice. This number defaults to one registered and one attended. You should notify vendors of upcoming training and determine how many representatives will be present from each store.
6. Fill out the Notes & Trainers tab. Include in notes what topics were covered in the training, questions that vendors had or any extra training that might be needed.
7. Click the Save icon  to save the new record.

Note: Once training has been saved it becomes read only. If the date or time change you will need to cancel the scheduled training and create a new Training record



Notes & Trainers Tab

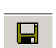
The Notes & Trainers Tab lets you enter notes about the training and designate the trainers.



Information displayed at the top of the tab is:

- Date and Time Trained - The date and time of the training class.
- Location – The location of the training.

To Enter Data:

- Enter any notes you wish, then
- Highlight the names of the trainers who will be teaching the course and click the **[Include]** button.
- Click the Save icon  to save changes.

ADDITIONAL INFORMATION

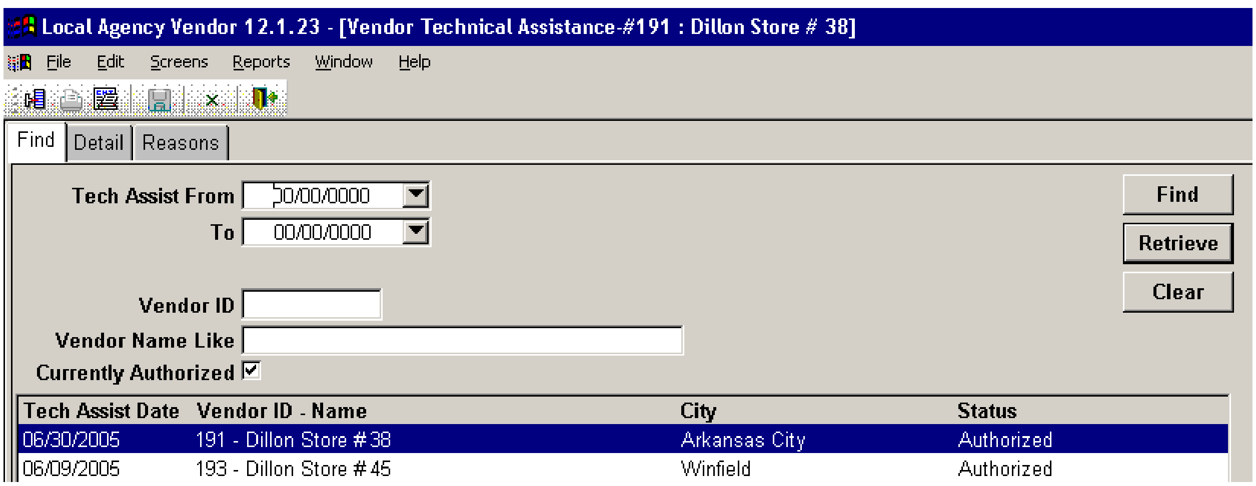
- ➢ Training Date, Time and Location fields are required to save a new record.

Vendor Technical Assistance Window

Local Agency staff members, along with the WIC State Agency, have the responsibility of alerting an authorized WIC vendor of non-compliance with WIC program requirements. This formal notification, called Technical Assistance, may be provided in person during a monitor visit to the store, by telephone, or by letter. Technical Assistance provided in person or by phone must be documented with a formal letter to the vendor. If not corrected, non-compliance may lead to a Notice of Correction.

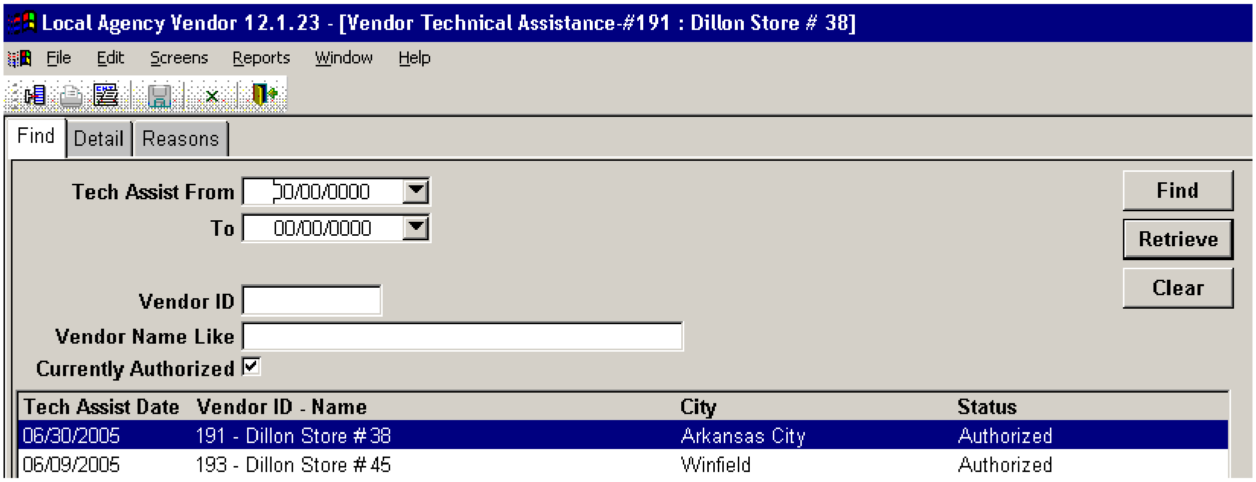
The **Vendor Technical Assistance Window** is used to document information about technical assistance provided to a vendor or review previous assistance, there are 3 tabs:

- Find
- Detail
- Reasons

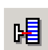


Find Tab

The **Find Tab** is used to locate the record of a previous Technical Assistance provided to a vendor.



To Enter A New Technical Assistance Record:

Click the New icon  on the toolbar. A blank Detail tab opens enabling the user to select the vendor from the dropdown list.

Enter The Following Information To Find A Previous Technical Assistance Record:

1. Click the **[Find]** button to show all existing technical assistance events. This could be a very long list.

   OR enter one or more of the following search parameters then click the **[Find]** button:

   - Tech Assist From/To finds all records between the beginning and ending dates of the range you want to search.
   - Vendor ID finds records for a specific vendor. Remember, you will only see information regarding vendors assigned to your agency.
   - Vendor Name Like - Enter the name or partial name of a specific vendor to limit the search to all Technical Assistance events provided to the selected vendor.

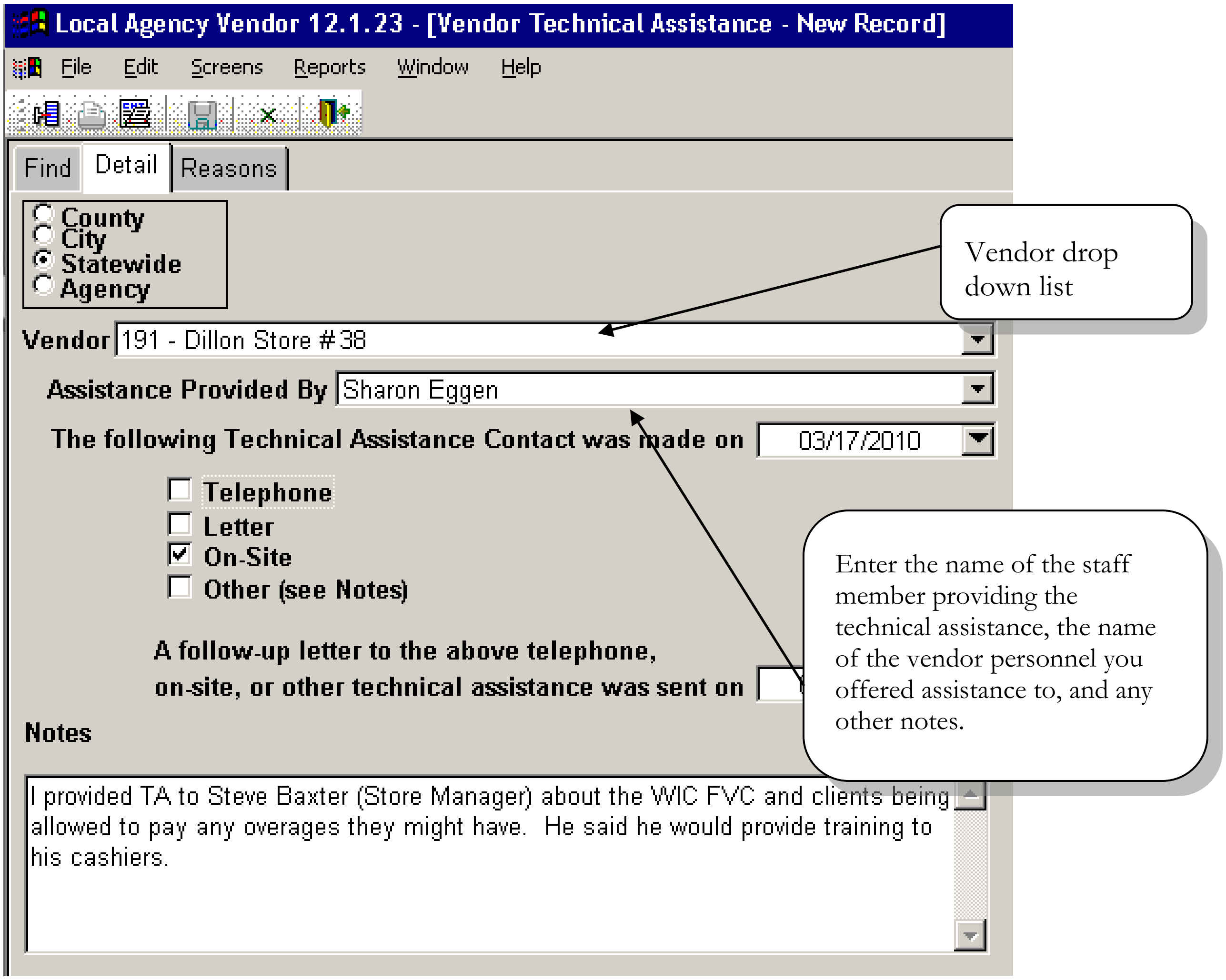
2. In the list box, click the record you wish to work with highlight it and click the **[Retrieve]** button. The Detail tab opens and displays data about the record you selected.

3. The **[Clear]** button clears all search fields, so that you can start a new search.

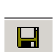
4. The search list remains after a record has been retrieved. If you want to look at a second record from the same list be sure to highlight it and click retrieve to pull up the second record; otherwise, the original record's information is still displayed.

Detail Tab

The **Detail Tab** is used to view, add, enter a new and/or edit the details of Technical Assistance provided to a Vendor.

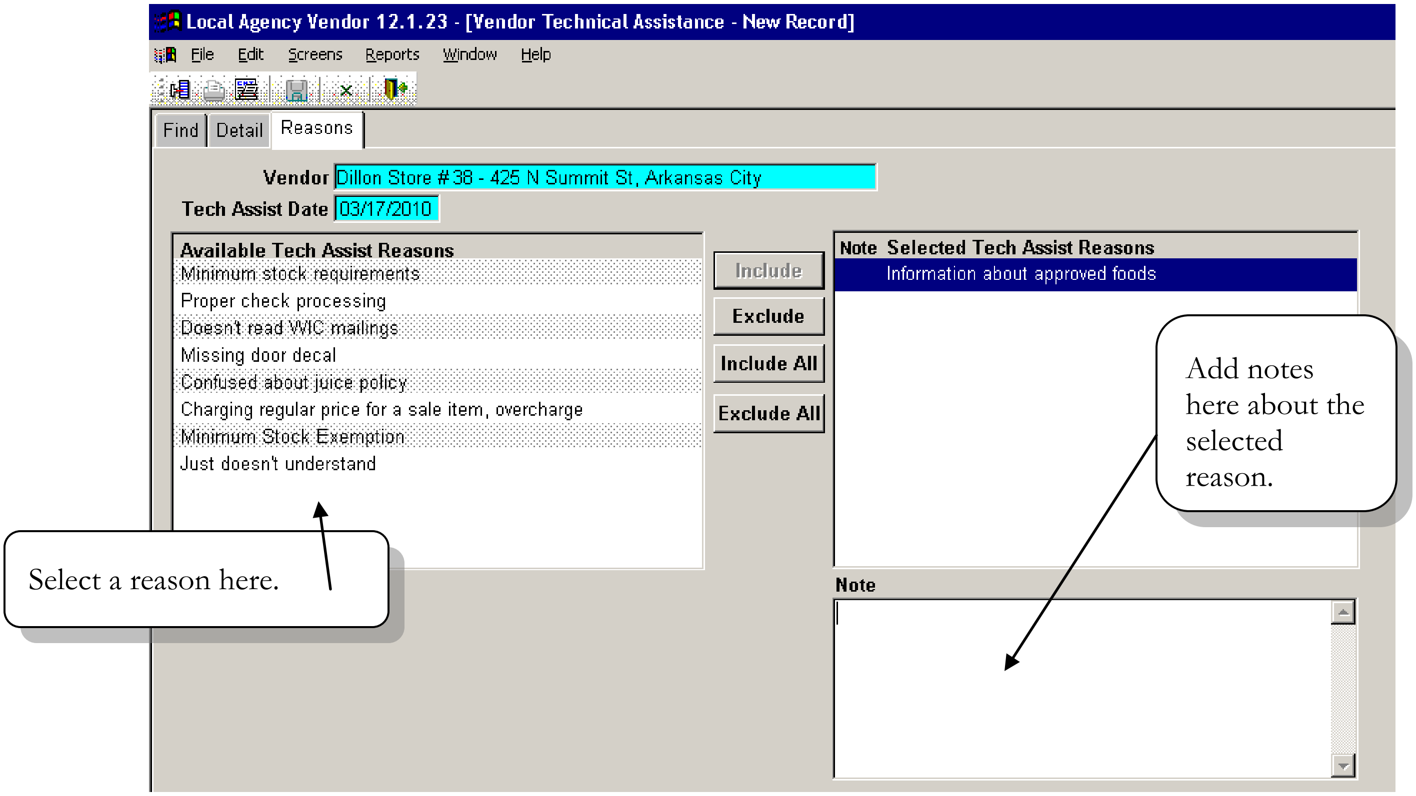


Enter The Following Information:

1. Select the Vendor that received the Technical Assistance.
2. Enter the date the contact was made. If no date is entered this field defaults to today's date.
3. Check the box in front of the way the Technical Assistance was provided (by Telephone, Letter, On site visit, or other). If other is selected, document the details in the Notes field.
4. Enter the date a follow-up letter was sent.
5. Enter information on the Reasons tab.
6. Click the **Save** icon  to save the new record.
7. The vendor and contact date are required to save a new record.

Reasons Tab

The **Reasons Tab** is used to document the reasons for a vendor's technical assistance.



Enter The Following Information:

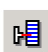
1. Highlight an Available Reason by clicking on it, and click the **[Include]** button to move it to the Selected Reasons box. Multiple reasons can be highlighted and moved.
   - A note may be added to a highlighted Selected Reason. Click on the Selected Reason you wish to add a note to and type in the note field that appears at the bottom of the screen. A blue check appears in the note column of Selected Tech Assist Reasons that have a note attached.

To remove a reason, highlight it in the Selected Reasons box and click the **[Exclude]** button.

Skill Builder
Technical Assistance

Instructions: Use the information below to enter a new Technical Assistance record.

The clinic received a call from a client informing the WIC staff that the WIC store where she shops did not have WIC approved juices stocked. The clinic called the store manager who stated their supply of juice was temporary out of stock but they have received a new order. Steps have been put in place at the store to ensure this does not happen again. A follow-up letter was sent to the store manager confirming the phone conversation and reminding him of the stock requirements in his contract with WIC.

1. Select the Screens Menu.
2. Select Vendor Technical Assistance.
3. Push the **New** icon  to add a new record.
   - Select the vendor who received the Technical Assistance.
   - Enter the date the contact was made. If no date is entered this field defaults to today's date.
   - Check the box in front of the way the Technical Assistance was provided (by Telephone).
   - Enter the date a follow-up letter was sent to the vendor.
   - Select a reason for the Technical Assistance on the Reasons tab.
   - Click the **Save** icon  to save the new record.

Vendor Complaint Management Window

The **Vendor Complaint Management Window** is used to view, edit, and add information about a complaint against an authorized WIC vendor. This window may also be used to enter a new complaint.

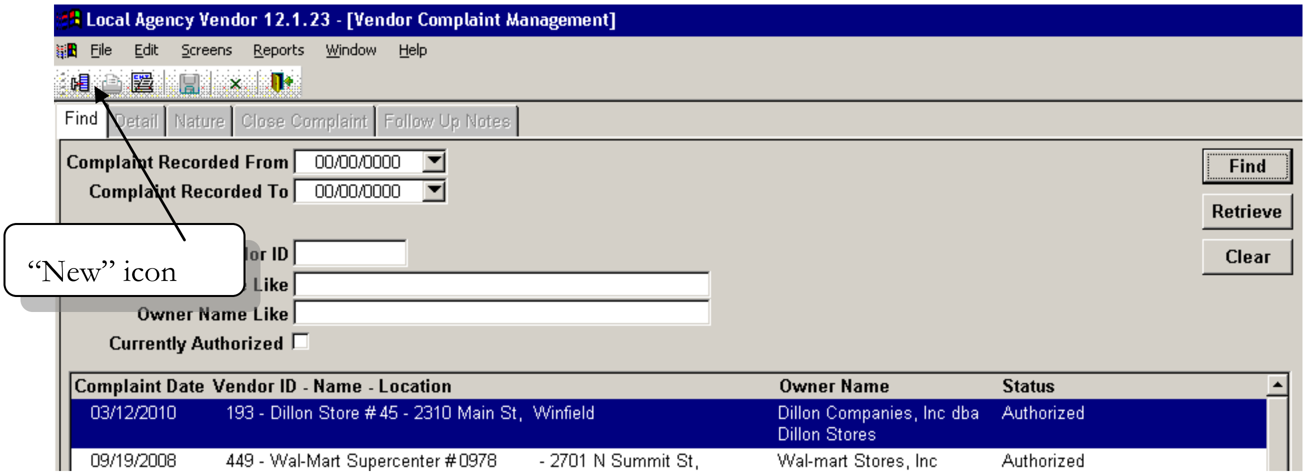
The **Vendor Complaint Management** window has 5 tabs:

- Find
- Detail
- Nature
- Follow Up
- Follow Up Notes

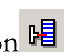
Vendor complaints managed in this window may have been recorded in the Vendor Complaint Recording in Client Services.

Find Tab

The **Find Vendor Complaint** tab is used to enter a new complaint or to locate the record of a previous vendor complaint.



To Enter A Vendor Complaint Record:

Click the New icon  on the toolbar. A blank Detail tab opens enabling the user to select the name of the clinic and the vendor from the dropdown lists.

Enter the Following Information to Find a Previous Vendor Complaint Record:

1. Click the **[Find]** button to show all existing complaints. This could be a very long list.

   OR enter one or more of the following search parameters then click the **[Find]** button:

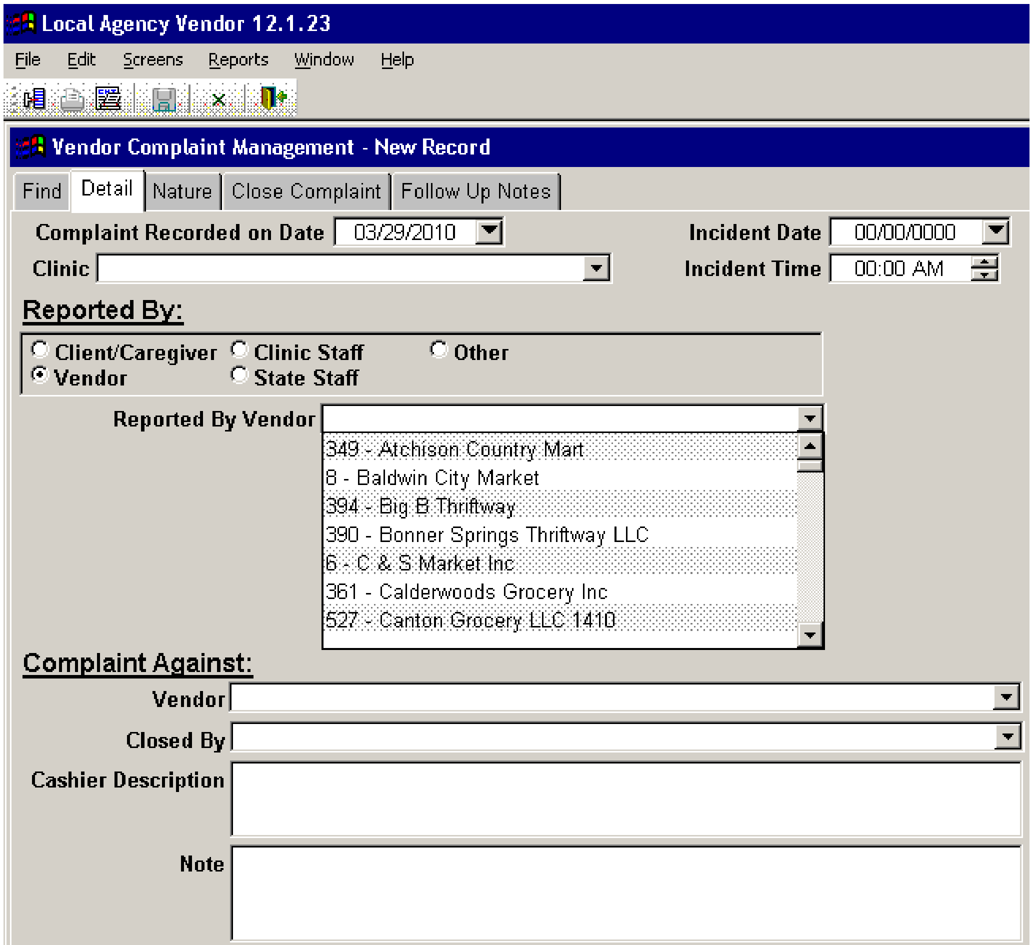
   - Complaint From/To field finds all records between the beginning and ending dates of the range you want to search.
   - Vendor ID – Enter the vendor ID
   - Vendor Name Like - Enter the name or partial name of a specific vendor to limit the search for all complaints received against a specific vendor.
   - Owner Name Like - Enter the name or partial name of the owner to limit the search for all complaints received against a specific owner.

2. In the list box, click the record you wish to work with to highlight it, and click the **[Retrieve]** button. The Detail tab appears and displays data about the record you selected.

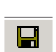
   - The **[Clear]** button clears all search fields and the return list so that you can start a new search.
   - The search list remains after a record has been retrieved. If you want to look at a second record from the same list be sure to highlight it and click retrieve to pull up the second record; otherwise, the original record's information is still displayed.

Detail Tab

The **Detail** tab is used to view, add and/or edit the details of complaint against a vendor.

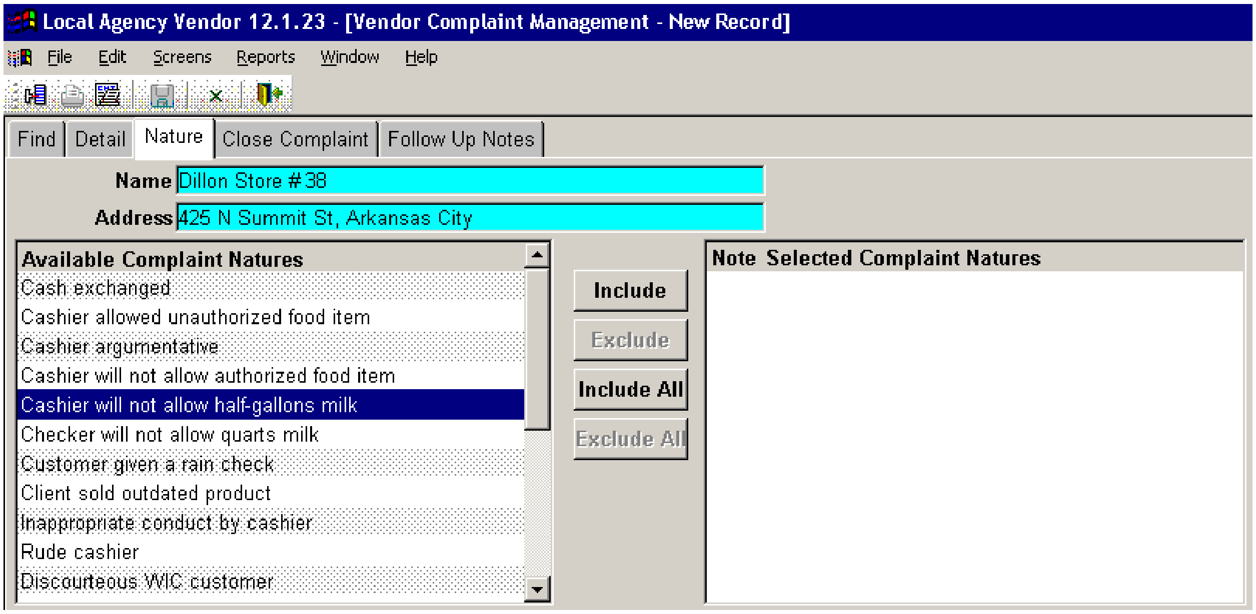


Enter The Following Information:

1. Enter the Complaint Date - date the incident occurred.
2. Select the WIC clinic making the complaint.
3. Reported By - select who submitted the complaint.
    - If you select other you must describe the type of the person submitting the complaint in the field that appears next to other.
4. Enter the vendor the complaint is against:
    - Vendor - Select the name of the vendor the complaint was issued against.
5. Select the complaint nature from the Nature tab.
6. Click the **Save** icon  to save the complaint.
    - A vendor, complaint date, and at least one nature must be selected to save a new record.

Nature Tab

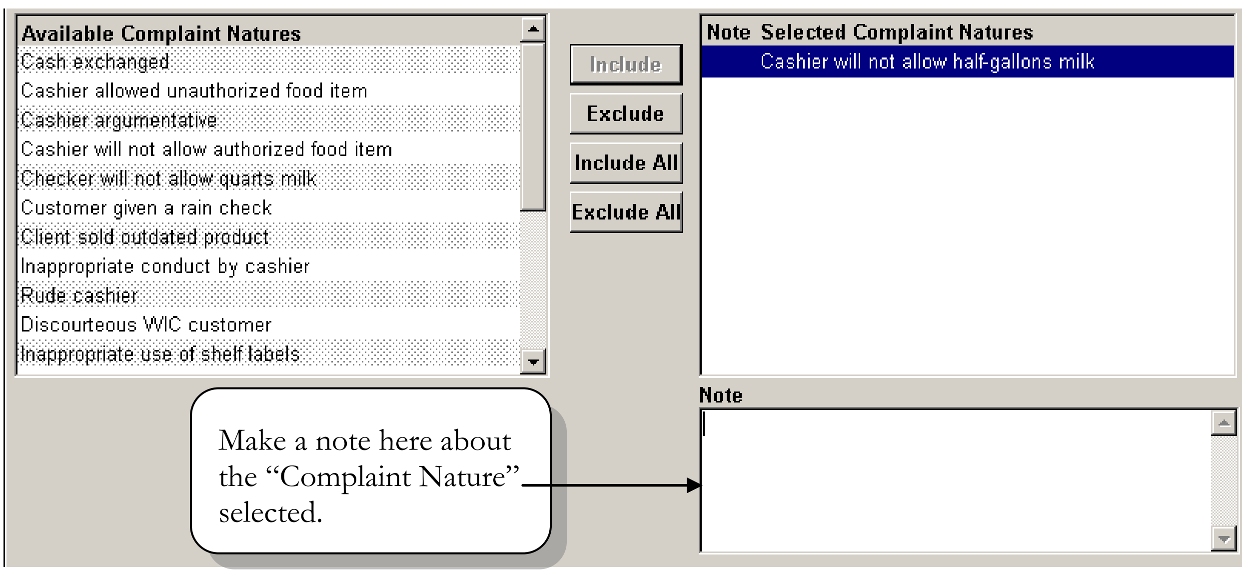
The **Nature** tab is used to document the nature of a complaint against a vendor.



Enter The Following Information:

1. Highlight an Available Complaint Nature by clicking on it, and click the **[Include]** button to move it to the Selected Complaint Natures box. Multiple complaint natures can be highlighted and moved.

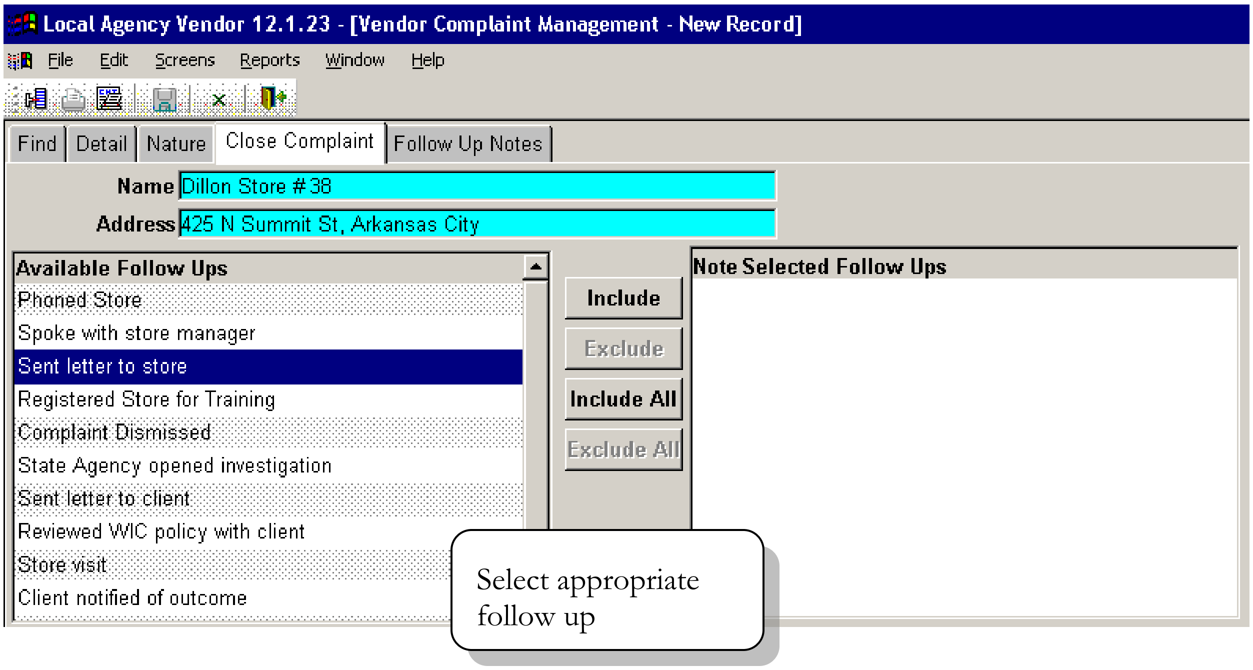
2. A note may be written to further detail the nature of the complaint by highlighting a Selected Complaint Nature. Enter the note in the field that appears at the bottom of the screen. A blue X appears by every complaint nature with an associated note.



1. To remove a complaint nature, highlight it in the Selected Complaint Natures box and click the **[Exclude]** button.

Close Complaint Tab

The **Close Complain** tab is used to document the follow up method on a complaint received against a vendor.



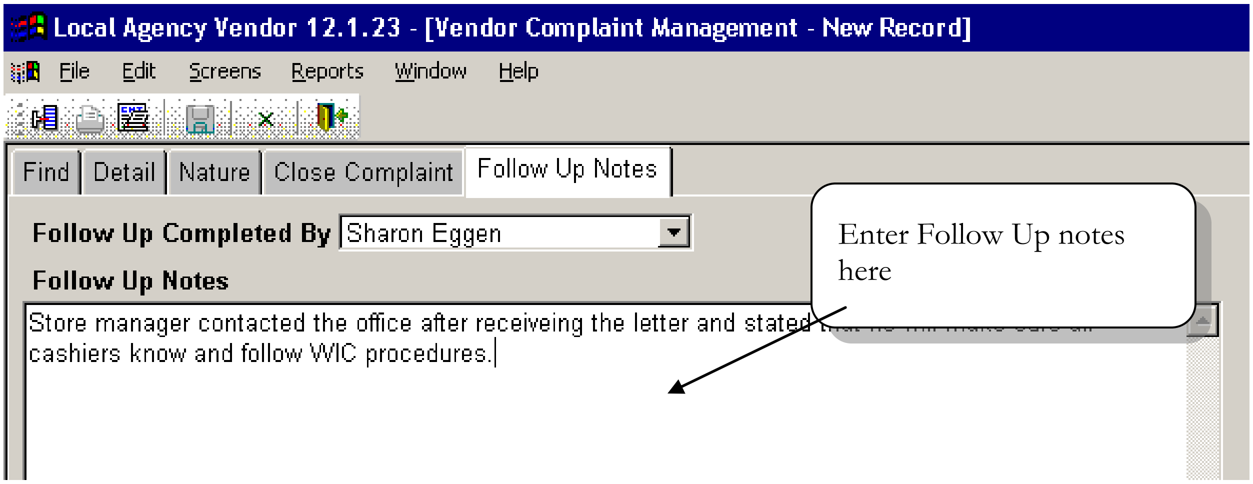
Enter the Following Information:

1. Highlight an Available Follow Up by clicking on it, and click the **[Include]** button to move it to the Selected Follow Ups box. Multiple follow-ups can be highlighted and moved.

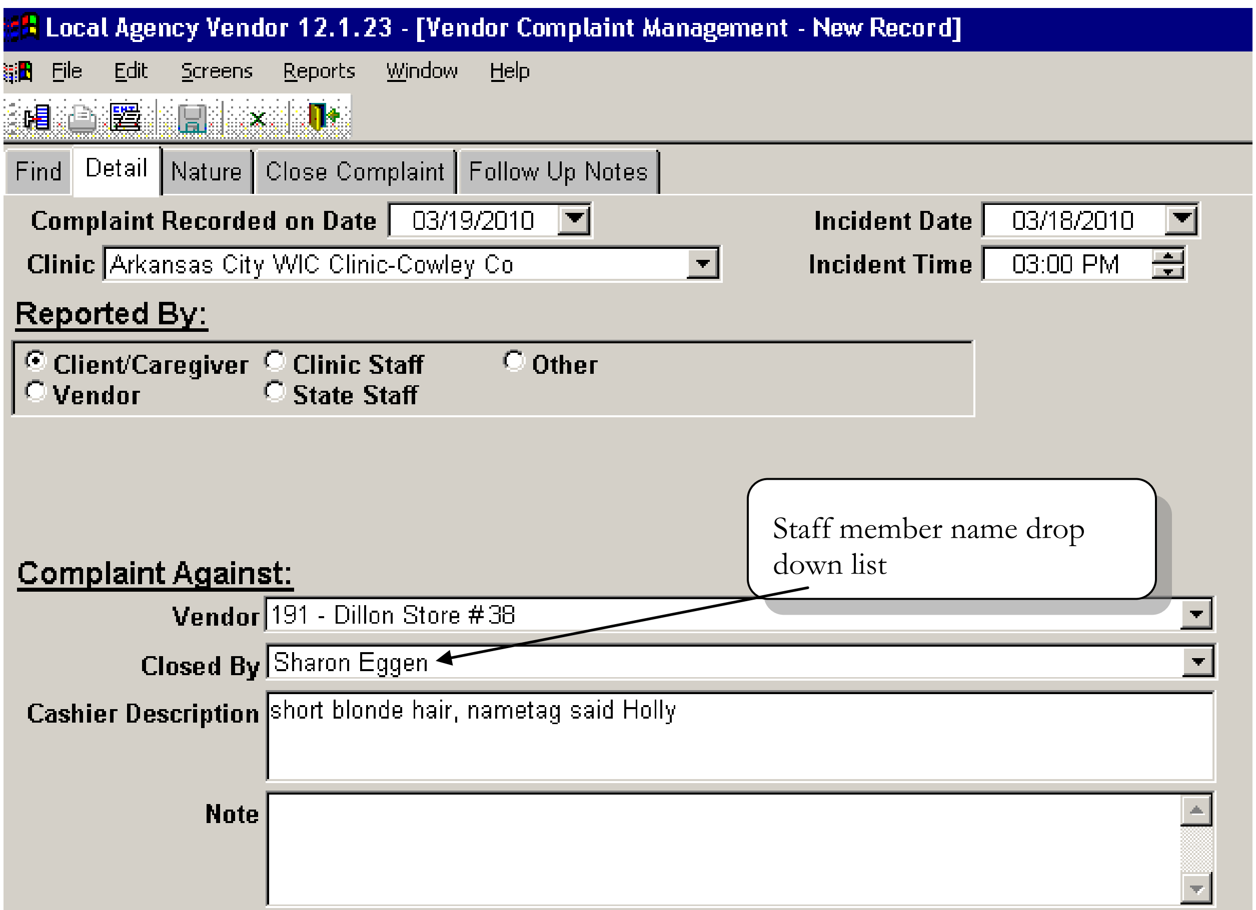
2. To remove a follow up, highlight it in the Selected Follow Ups box and click the **[Exclude]** button.

Follow Up Notes Tab

The **Follow Up Notes** tab is used to record notes on a follow up of a complaint recorded against a vendor, and to document the staff person who completed the follow up.



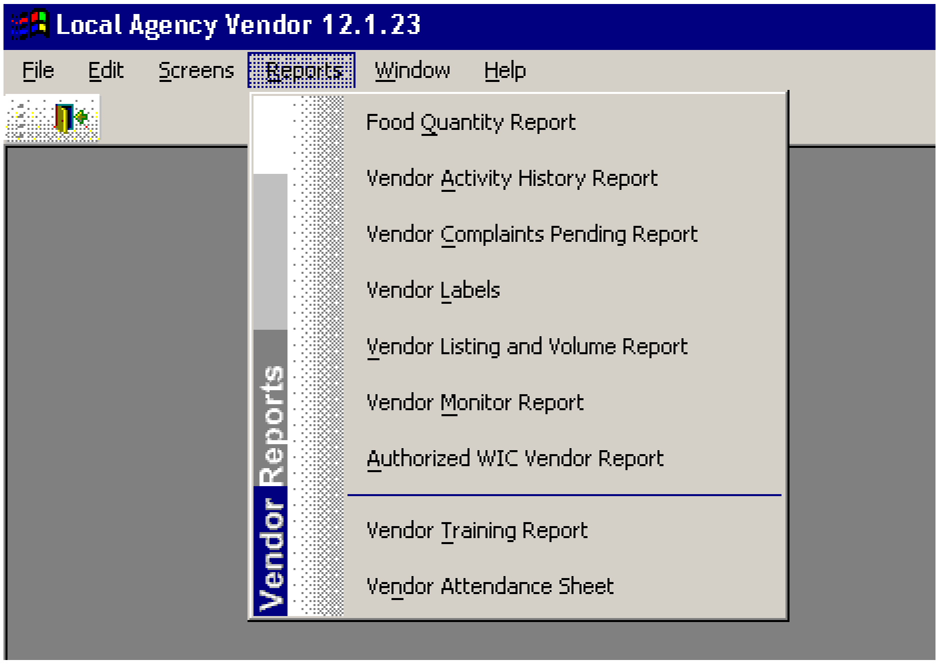
Enter The Following Information:
Enter the staff member name or select from the drop down window.



1. Enter notes regarding the follow up and click the **Save** icon .

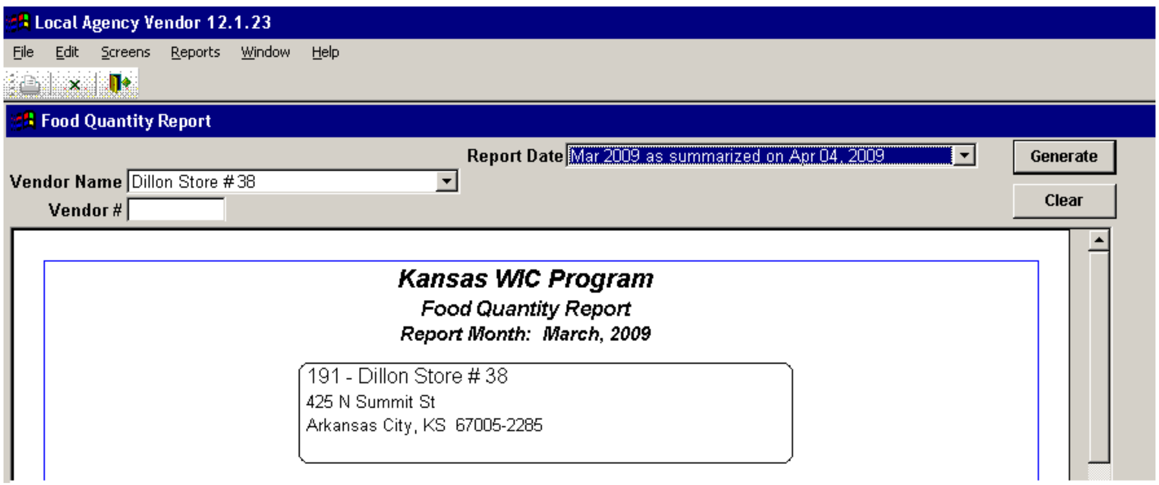
Reports Menu

The **Reports Menu** provides access to a variety of reports that may be generated as required by the user.



Food Quantity Report

The Food Quantity Report displays the quantity and commodity description of foods issued to WIC clients whose checks were redeemed at a selected vendor for a selected month. The report displays the vendor name, address and ID number, the amount of foods on the checks, and the food type. The number of checks redeemed and the number of clients cashing those checks and the total redeemed value are also displayed. This report runs for a selected month, for a selected vendor. This report can be printed and mailed to the vendor each month. If the vendor does not want the report and has had no problems with minimum stock, the Local Agency will make the decision whether to continue sending the report monthly.



To Generate The Report:

1. Select the search criteria as follows:
   - Report Date - Enter month and year.
   - Vendor Name- Select a specific vendor if required. Leave blank if the report is for all vendors assigned to your agency.
   - Vendor # - Selects a specific vendor.
2. Click the **[Generate]** button.
3. Click the **[Clear]** button to erase the search criteria and search results.
4. Click the **Print** icon  to print the report.

Skill Builder
Food Quantity Report

Instructions: Use the information below to generate the Food Quantity Report.

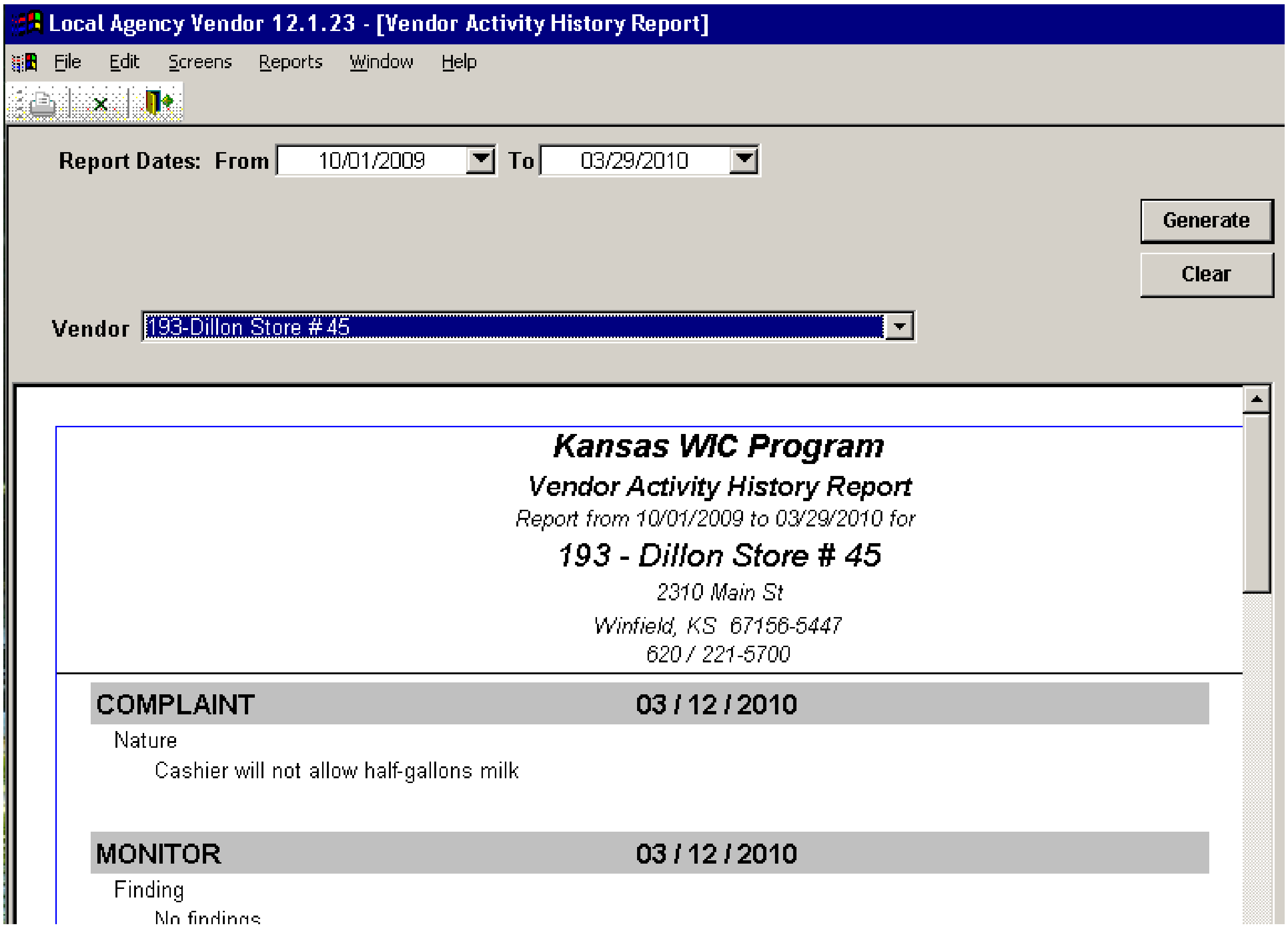
If you already know a vendor's ID number, please use steps 1, 5 and 6.

1. Select the Food Quantity Report.
2. Select a Report Date and Generate the report. Please note that this report will be very long. DO NOT PRESS THE PRINT ICON.
3. Scan the generated report and select a vendor. Jot down the vendor's ID number.
4. Click the **[Clear]** button to clear the search criteria.
5. Enter the Vendor ID and Report Date for the vendor selected in step 3.
6. Generate and print the report.

Vendor Activity History Report

The Vendor Activity History report window is used to generate and print the Vendor Activity History report.

The Vendor Activity History report presents a chronological listing of the different activities and contacts between the Local and/or State WIC Agencies and a specific retail location. This report draws summary information from the other vendor application tab sets. The Vendor Activity History report contains information about technical assistance, monitors, investigations, complaints against vendors, and vendor training. This report should be reviewed on a regular basis to monitor contacts with vendors.
This report runs for a selected report period, for a selected vendor.



To Generate The Report:

1. Select the search criteria as desired:
   - Report Dates:
   - From - The beginning date of the range you want to search.
   - To - The ending date of the range you want to search.

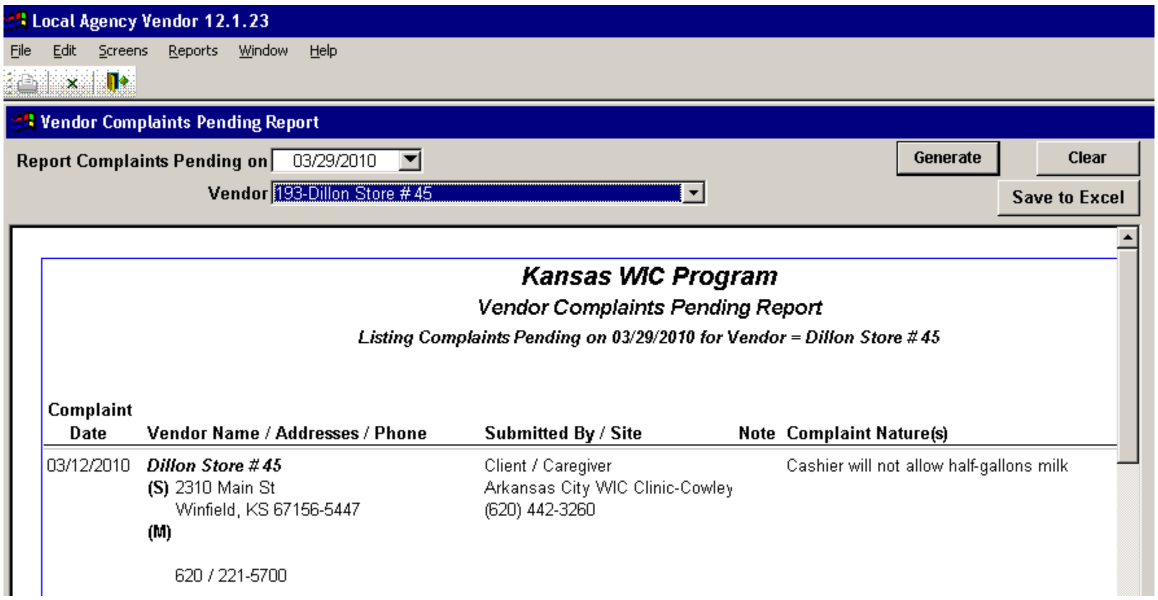
- Vendor - Select the name of the desired vendor using the selection list. A vendor must be selected to run this report.

2. Click the **[Generate]** button.
3. Click the **[Clear]** button to erase the search criteria and search results.
4. Click the **Print** icon to print the report.

Vendor Complaints Pending Report

The Vendor Complaints Pending report lists all complaints against vendors with no follow-up received before the date selected, sorted by vendor and complaint date. The report may be run for a specific vendor or all vendors. Leaving the vendor box blank returns all vendors assigned to your agency with complaints pending.

This report should be run monthly to make sure all complaints are handled in a timely manner.

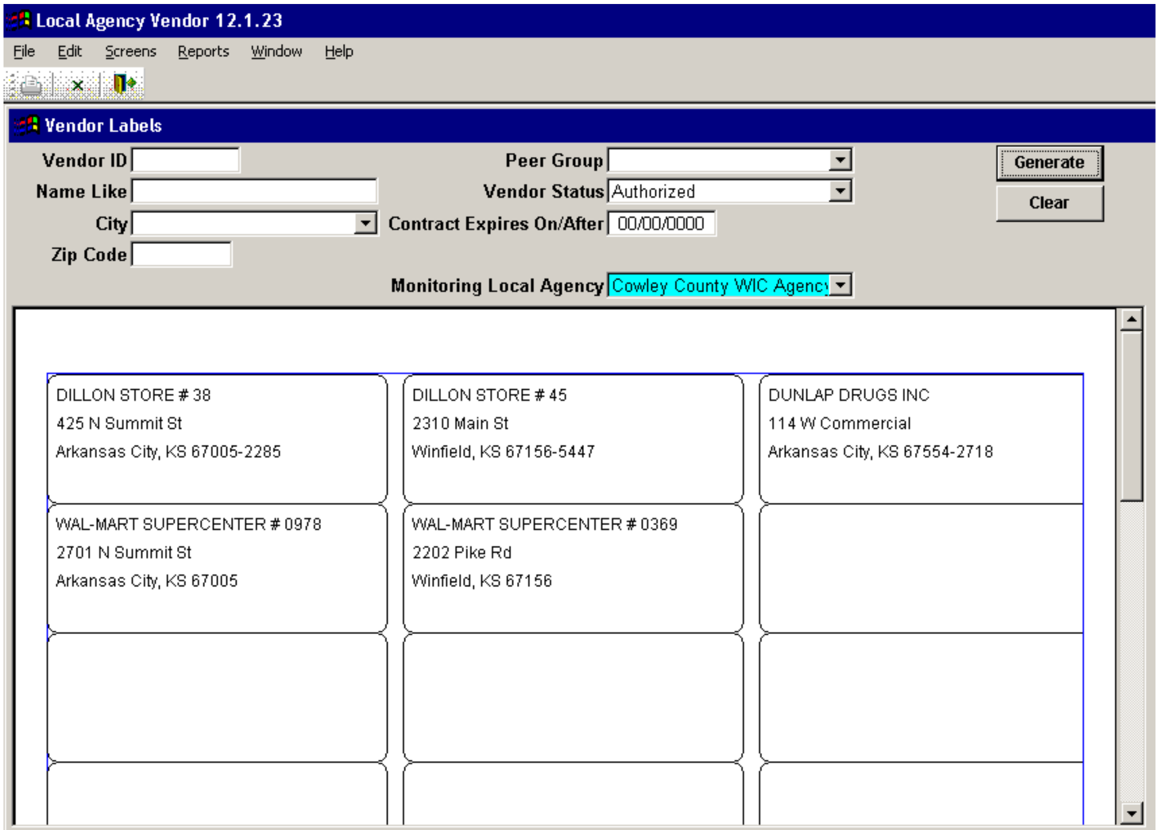


To Generate the Report:

1. Select the search criteria as follows:
   - Report Complaints Pending on - the date from which the report should be based. All complaints with no follow-up received before the date entered, appear on the report.
   - Vendor - Select the name of a vendor for a specific vendor. Leave blank to generate a report for all vendors assigned to your agency. A report showing all vendors may take a few minutes to generate.
2. Click the **[Generate]** button.
3. Click the **[Clear]** button to erase the search criteria and search results.
4. Click the **Print** icon  to print the report.

Vendor Labels

The Vendor Labels Report prepares mailing labels for one or many vendors based on the selection criteria entered. The selection criteria include vendor ID or name, city, county, or zip code, and status. The page is set up for two rows of seven labels, to be printed or copied onto laser labels.



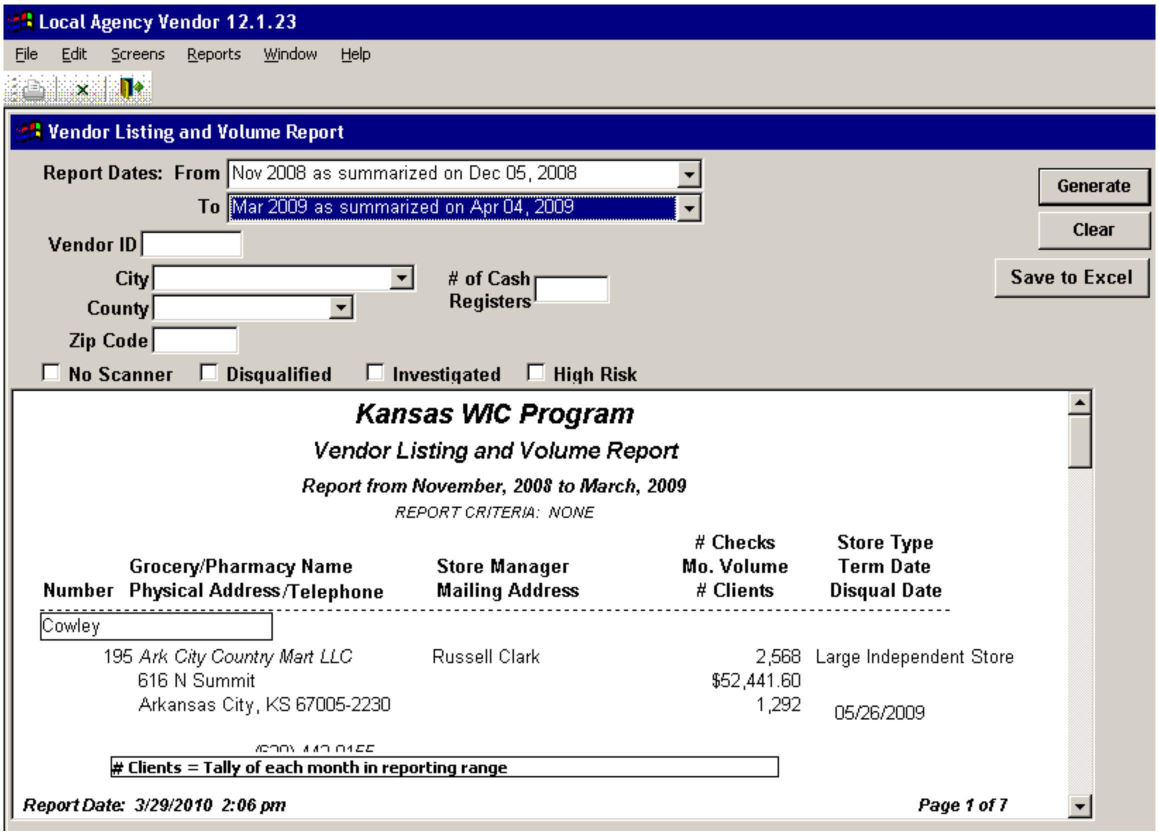
To Generate Labels:

- Select the search criteria as follows:
- Vendor ID - Enter the vendor ID to generate labels for a specific vendor.
- Name Like - Select the name of a vendor to generate labels for that vendor. Leave blank to generate labels for all vendors. Labels showing all vendors may take a few minutes to generate.
- City - Select a city from the selection list to print labels for all vendors in that city.
- Zip Code - Enter a zip code to print labels for all vendors in that zip code.
- Peer Group – Select a peer group for all vendors in that peer group.
- Status - Select active to generate labels for all vendors with an active status assigned to your agency. Select pending active to generate labels for all vendors with a status of pending.
- Click the **[Generate]** button to generate the labels.

- Click the **[Print]** icon  to print the labels after putting blank mailing labels in the printer paper tray.
- Click the **[Clear]** button to erase the search criteria and search results.

Vendor Listing and Volume Report

The Vendor Listing and Volume Report provides demographic and volume information for vendors. It shows the county, vendor number, name, street address, mailing address, store manager, and telephone number. This report also calculates monthly volumes for the number of Food Instruments (FI) redeemed, the total dollar volume of FI's redeemed, and the number of clients served by that vendor. It also shows the Store Type, and termination and disqualification dates, if applicable, for each vendor listed.

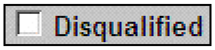


To Generate the Report:

1. Select the search criteria as follows:
   - Report Dates:
     - From - The beginning date of the range you want to search.
     - To - The ending date of the range you want to search.
   - Vendor ID - enter a Vendor's ID to generate the report for a specific vendor.
   - City – select a city from the drop down to generate the report for a specific city.
   - County - select a county from the drop down to generate the report for a specific county.
   - Zip Code - enter a zip code to print labels for all vendors in that zip code.
   - # of Cash Registers – enter a number to show vendors who have a specific number of cash registers

Check one or more of the following to narrow the search:

- check to show all vendors that do not use scanners



- check to show all vendors with a status of disqualified

- check to show all vendors that have been investigated. This report does not include those vendors with an open investigation.

- check to show all vendors that are High Risk.

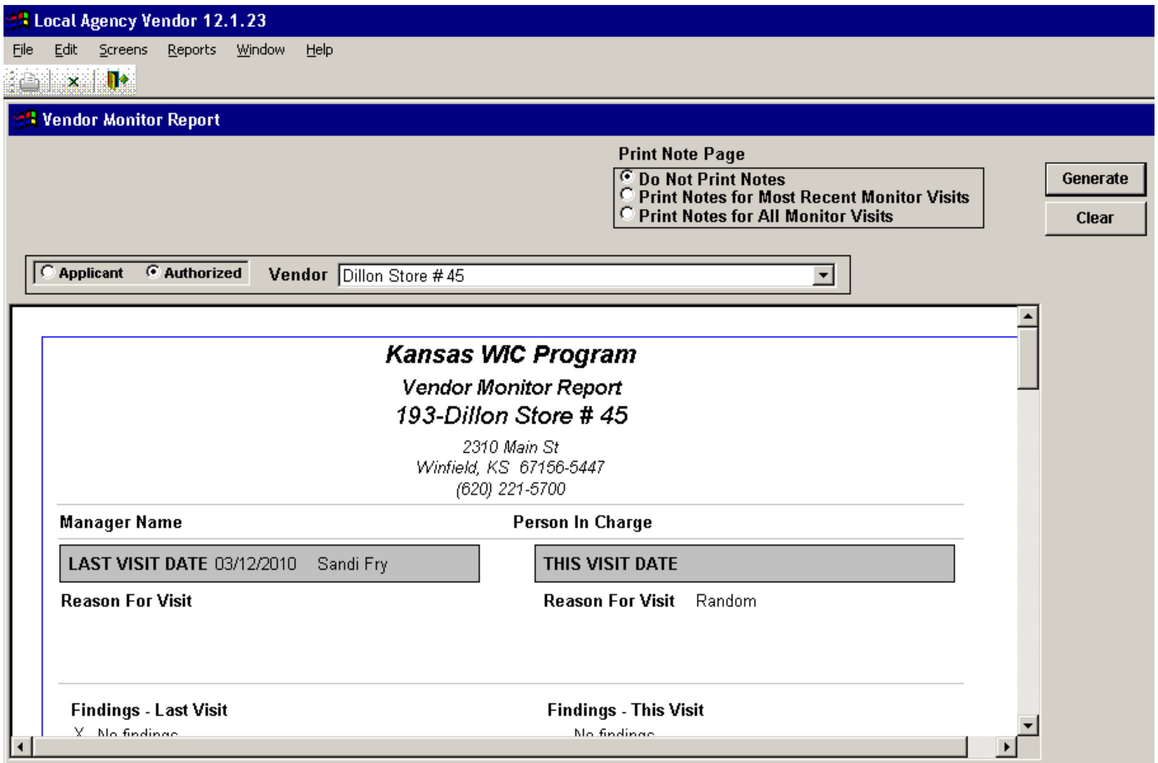
2. Click **[Generate]** button to generate the report.
3. Click **[Clear]** to erase the search criteria and search results.
4. Click **[Save to Excel]** to save the generated report as an Excel spreadsheet.
5. Click the Print icon  on the toolbar to print the report.

Vendor Monitor Report

The Vendor Monitor Report window is used to generate and print the Vendor Monitor Report. The Local Agency Vendor Management application lists only vendors assigned to your Local Agency.

The left side of the Vendor Monitor Report provides information gathered during the previous monitor visit to the selected vendor, if any. The right side of the report is used as a worksheet to document information gathered during the next monitor visit. After the monitor visit is complete, the information gathered is then entered as a new monitor in the vendor monitor window.

This report runs for a selected vendor.



To Generate The Report:

1. Select the search criteria as follows:
   - Vendor - Select the name of the desired vendor using the selection list. A vendor must be selected to run this report.
2. Click the **[Generate]** button
3. Click the **Print** icon  to print the report.
4. Click the **[Clear]** button to erase the search criteria and search results.

Authorized WIC Vendor Report

The Authorized WIC Vendor Report provides a list of vendors assigned to your Local Agency.

To generate and print the report:

1. Click **[Generate]**.

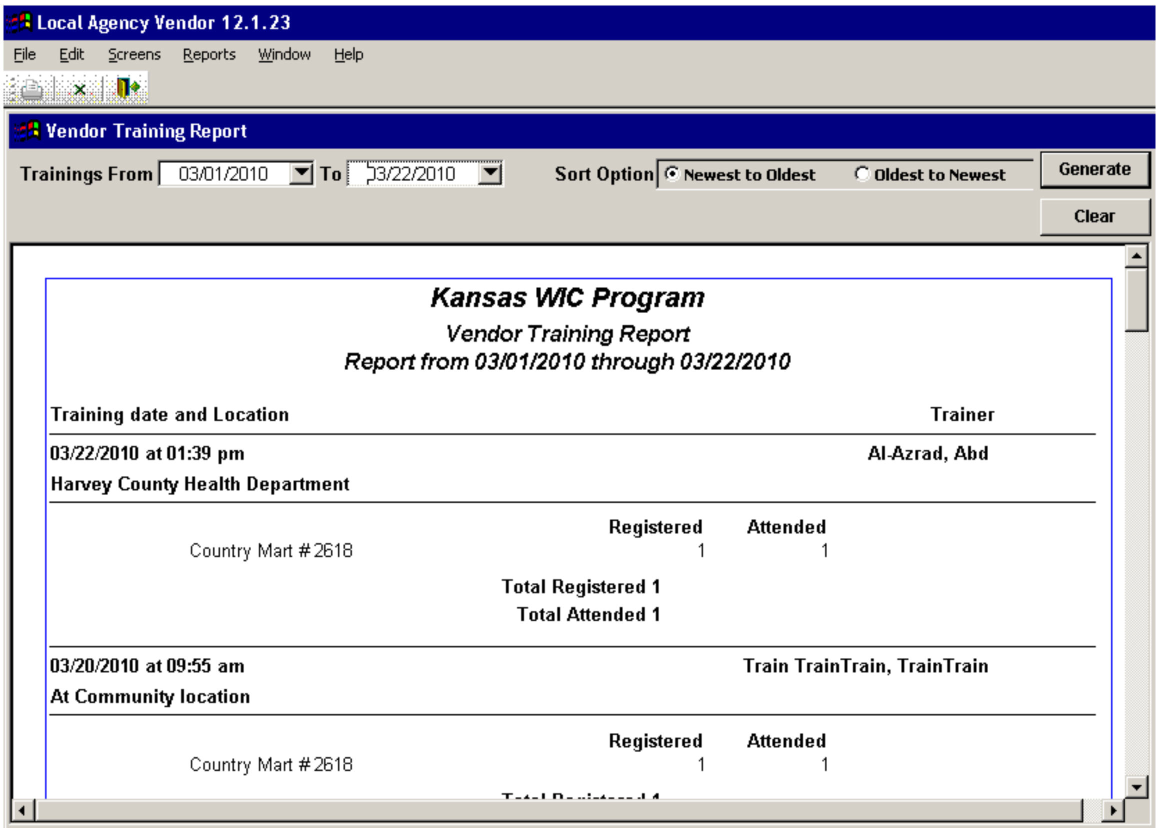
2. Click **[Clear]** to erase the search criteria and search results.

3. Click the Print icon  on the toolbar to print the report.

Vendor Training Report

The Vendor Training Report Window is used to generate and print the Vendor Training report. The Local Agency Vendor Management application lists only vendors assigned to your Local Agency.

Vendor trainings with a "Training Date and Time" are displayed in date ascending order. For each vendor training, the date, time and location display along with the list of stores associated with the training. For each store, the store name, the number of persons registered and the number of persons attended display. A summary line of "Total Registered" and "Total Attended" displays for each training.

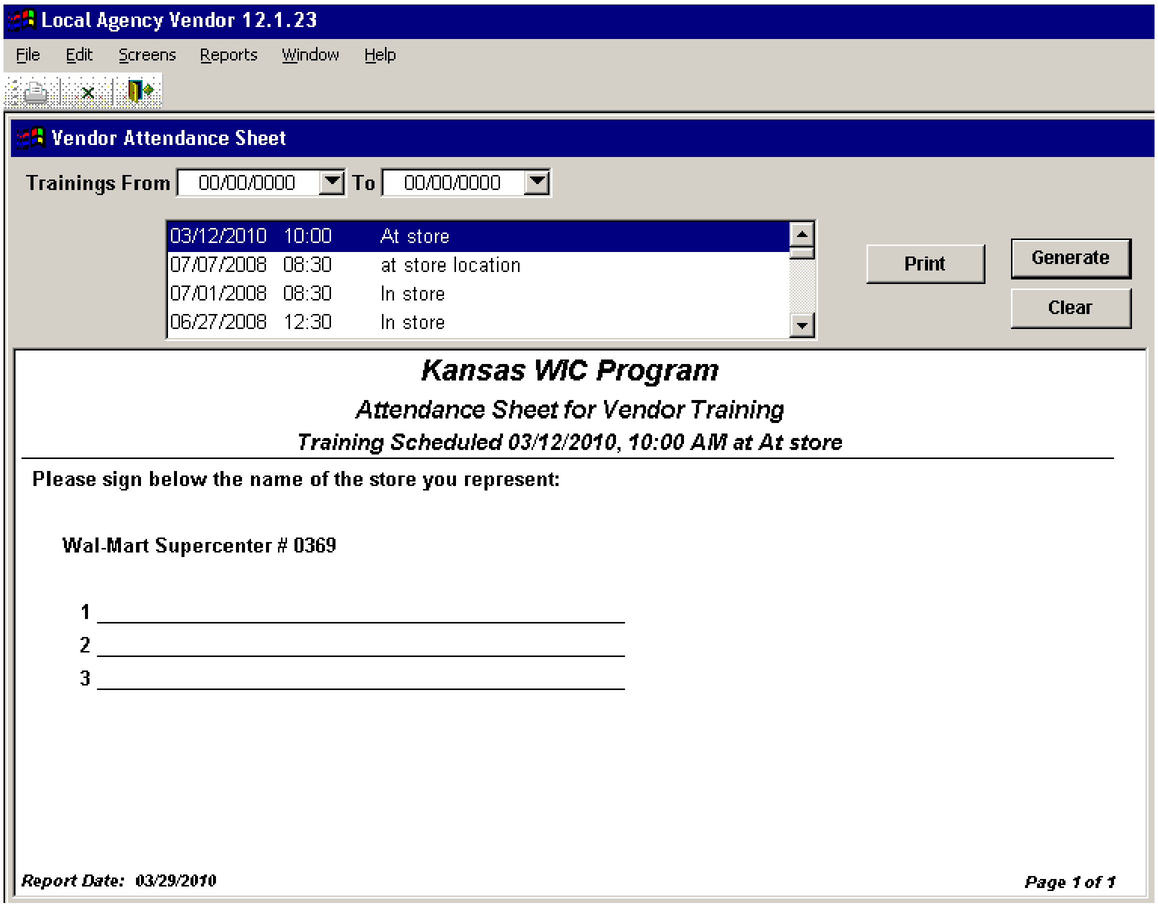


To Generate The Report:

1. Enter a range of dates.
2. Sort Option: select the order you want the training to display in:
   a. Newest to Oldest
   b. Oldest to Newest
3. Click the **[Generate]** button.
4. Click the **[Clear]** button to erase the search criteria and search results.
5. Click the **Print**  icon to print the report.

Vendor Training Attendance Sheet

The Vendor Training Attendance Sheet Window is used to generate and print the Vendor Training Attendance Sheet. The Local Agency Vendor Management Application lists only Vendors assigned to your local agency. Vendors are listed alphabetically. Vendors must be pre-registered in the Vendor Training Window to appear on this attendance sheet. This attendance sheet should be printed and used as a sign in sheet at all trainings. The information is used later to record the number of attendees in the Vendor Training Window.



To Generate The Report:

1. Enter a range of dates to narrow the selection in the training drop-down list.
   - Leaving the "To" date blank selects all trainings on or after the "From" date. Leaving the "From" date blank selects all trainings on or before the "To" date. Leaving both dates blank displays ALL training classes ever scheduled.
   - Clicking the **[Clear]** button clears the dates and resets the Training drop-down list.
2. Select a training course and click the **[Generate]** button.